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ABSTRACT

This handbook is intended to aid Job Training Partnership Act (JTPA) program staff to design, implement, and evaluate training programs for older workers under Section 124 of JTPA. The guide contains four main parts. The first part of the guide presents an overview of the JTPA and its provisions regarding services to older workers. This part of the handbook also describes the work of the National Commission for Employment Policy and its role under the new legislation. Part 2 discusses four steps in the design of a training program for older workers, first from the perspective of the older workers, and then from the perspective of employers. This part also reviews some of the administrative issues of program development. The third part of the guide outlines the various components of JTPA programs for recruiting, training, and placing older workers. Finally, part 4 discusses the ways that program evaluation can improve program operations and the data needed to assess a program's effectiveness. Program evaluation is also examined from the perspective of older participants, employers, and the community that the program serves. Appendixes to the document include (1) abstracts of the National Commission for Employment Policy research studies, (2) lists of research papers abstracted and other references, (3) lists of organizations focusing on older workers, and (4) a synopsis of a study on older workers in industry. (KC)

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A PRACTITIONER'S GUIDE
For
TRAINING OLDER WORKERS

AUTHOR:
BRENDA LESTER

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FOREWORD

The author of this guide, Brenda Lester, has had over ten years of experience in employment and human resource programs. She has worked for Green Thumb, Inc., one of the SCSEP national sponsors, and the Office of National Programs for Older Workers, Employment and Training Administration, U.S. Department of Labor.

She received assistance in the preparation of the guide from employment and training professionals in various older worker programs. Thanks are given to Dr. Richard Redmond, Lynn Gartner, Dr. Sandra Timmerman, Sandra Sweeney, Annette Buchanan, and Gale Gibson. Special appreciation goes to Dr. Steven Sandell and Dr. Janet Johnson for their continuing support and useful suggestions during the production of this guide.

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NOTE: THIS HANDBOOK IS NOT AN OFFICIAL POLICY GUIDE OF THE U.S. DEPARTMENT OF LABOR. ANY QUESTIONS ON THE LAW, RULES, AND REGULATIONS FOR THE TRAINING OF OLDER WORKERS UNDER JTPA SHOULD BE ADDRESSED TO THE APPROPRIATE LOCAL, STATE OR FEDERAL OFFICIAL.

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INTRODUCTION

Since the 1960's, the population of the United States has been growing more slowly and getting older. These demographic trends are changing America's workforce and raising questions for future planning in the public and private sectors:

- What are the employment needs of older Americans?
- How successful have employment and training programs been in assisting older workers, and what improvements can be made?

To address these issues, the National Commission for Employment Policy made a thorough examination of the labor-market problems of older Americans and the national employment policies that affect them. In 1982, the Commission and the Employment and Training Administration of the U.S. Department of Labor sponsored 15 studies, which, with other research by Commission staff, examined policies and programs that have an impact on employment opportunities for older workers.

The National Commission for Employment Policy, an independent Federal agency, is mandated to advise the President and Congress on national employment and training issues. The Commission was established by the Comprehensive Employment and Training Act (CETA) of 1973 and was reauthorized by the Job Training Partnership Act (JTPA) of 1982. Under JTPA, the Commission is responsible for examining broad issues of development, coordination, and administration of employment and training programs.

With the enactment of JTPA, Congress also acknowledged the special employment and training needs of older workers. Section 124 of the Act provides for programs to assure the training and placement of older persons in employment opportunities with private business.

PURPOSE OF THE GUIDE

This guide is intended to help practitioners design, implement, and evaluate training programs for older workers under Section 124 of JTPA. It emphasizes using the findings of the Commission-sponsored research to develop strategies to help older workers obtain employment in the private sector.

The guide is based on the premise that JTPA practitioners will act as catalysts for bringing together older workers and private-sector employers. Older workers bring a lifetime of experience to the program, and with assistance can be fully involved in the procedures of determining their current skills and abilities, training needs, employment interests, and in developing a plan to secure a job in the private sector.

It is necessary and important to develop methods to increase employment opportunities for older workers in the private sector for several reasons:

1. The private sector has 80 percent of the jobs in the United States today.

2. Training has little value if no job follows the training.

3. Job placement depends on the consideration of older

workers for available jobs.

4. The private sector needs a workforce with the particular characteristics (reliability, experience, pride in work, efficiency) of older workers.

This handbook is intended to aid JTPA program staff in the establishment, administration, and operation of older worker employment and training programs.

- o Program administrators and planners can use the guide to develop and design training programs for older workers.
- o Program operators can use it to help recruit, train, and place older workers.
- o Program evaluators can use it to assess the effectiveness of the training programs and to make recommendations for program improvements.

ORGANIZATION OF THE GUIDE

This guide contains four main parts. Reference materials and other available resources are contained in the appendices.

Part One, "The Job Training Partnership Act," presents an overview of the Act and its provisions regarding services to older workers. This part of the handbook also describes the work of the National Commission for Employment Policy and its role under the new legislation. Some of the results of Commission-sponsored research or older workers were used to prepare this guide. Abstracts of these research studies are included in Appendix A.

Part Two, "Program Planning and Development," discusses four steps in the design of a training program for older workers, first from the perspective of the older workers (chapter 1) and then from the perspective of employers (chapter 2).

Chapter 1 provides research findings and background materials to help practitioners determine the employment needs of older workers. It addresses the labor-market problems of special groups of older workers such as economically disadvantaged workers, displaced older workers, older women reentering the labor market, older minority workers, and older workers with health limitations. Program implications and suggestions for ways to address the employment problems of these particular groups are included. These are marked ▲ for easy reference.

Chapter 1 also outlines the employment barriers that many older workers face in today's job market and suggests ways to minimize the effect of these barriers. The chapter also provides examples of training for older workers along with the advantages and disadvantages of various training methods. It concludes with information on organizing job search groups, job fairs, and job banks to increase the likelihood of placing older workers in private-sector jobs.

Chapter 2 identifies the workforce needs of employers, barriers to hiring older workers from the employers' perspective, and options employers can use to increase employment opportunities for older workers. This chapter also discusses techniques for marketing older workers to private-sector employers, focusing on the reasons older workers are hired, suggestions for developing a marketing strategy, and examples of two extensive marketing campaigns for older workers funded under CETA.

Chapter 3 reviews some of the administrative issues of program development: establishing linkages, coordinating the JTPA 3 Percent

Set-Aside Program with the Senior Community Service Employment Program (SCSEP) and other community service providers.

Part Three, "Program Operation," outlines the various components of JTPA programs for recruiting, training, and placing older workers.

Part Four, "Program Evaluation," discusses the ways that program evaluation can improve program operations and the data needed to assess a program's effectiveness. Program evaluation is also examined from the perspective of older participants, employers, and the community that the program serves.

This document is written in handbook style with a checklist at the end of each chapter. Suggestions for practitioners are **marked** ▲ throughout the guide.

PART ONE

THE JOB TRAINING PARTNERSHIP ACT

An Overview

The Job Training Partnership Act (JTPA) of 1982, Public Law 97-300, provides for job-training programs for disadvantaged persons and others who face serious barriers to employment. When JTPA fully replaced CETA on October 1, 1983, an era began in which the private sector's involvement in employment and training programs is actively sought.

Legislative changes include:

- **TRAINING** is emphasized, public-service employment is prohibited and work experience is restricted. Training for adults is to lead directly to unsubsidized employment with emphasis on private sector placement.

- **STATES** have increased administrative authority under JTPA. Governors have a greatly expanded role: designating the service delivery areas (SDAs), approving local job training plans, administering programs with specific set-asides, monitoring and evaluating program results.

- The **PRIVATE SECTOR** shares with local governments the responsibility for program planning, policy guidance, and monitoring. The legislation designated the private industry councils (PICs) as the mechanism for bringing private business and industry into the management of employment and training programs. A majority of the members of the PIC must represent business.

- The **FEDERAL GOVERNMENT'S** involvement in job training programs continues, but in a role consisting primarily of establishing performance standards and reporting requirements, approving State plans, conducting evaluations, assuring the fiscal integrity of the system, and issuing regulations.

- **PERFORMANCE STANDARDS** are an integral part of this new system with emphasis on outcome, not process.

- Participant **Support Services and Work Experience payments** are limited and **Stipends** are prohibited, although Needs-Based Payments are permitted. Support services and administration cannot exceed 30 percent of the funds, and administration cannot exceed 15 percent.

The focus of JTPA is on training and on the public-private partnership in the development and operations of programs.

JTPA and Older Workers

The special employment and training needs of older workers were recognized by Congress in JTPA by specifically including them in several JTPA titles. Services to older workers can be provided through several funding mechanisms:

- **Title II--Training Services for the Disadvantaged, Part A--Adult and Youth Programs**

The largest percentage of JTPA funding will be administered under title II-A by the service delivery areas (SDAs) according to local job training plans. These plans are developed jointly by the area's Private Industry Council (PIC) and local elected officials, and must meet statutory requirements as well as the Governor's special services and coordination plan requirements. However, the Governor may not infringe upon local discretion in the selection of clients and service providers (Section 121(b)(1)).

Services under title II-A are targeted to economically disadvantaged participants, including people age 55 and over. Up to 10 percent of the participants do not have to meet the economically disadvantaged eligibility criteria if they have encountered other barriers to employment. Older workers are among the groups encountering such barriers. Therefore, older workers who meet the income eligibility guidelines and some who do not but have employment problems may participate in title II-A programs administered through the SDAs.

- **The 3 Percent Set-Aside Programs for Older Individuals Section 124 of JTPA**

Of the funds allocated to each State under title II-A, 3 percent are reserved for training disadvantaged persons age 55+ (Section

202(b)(2)). This special set-aside program for older workers is administered by the Governors of the States, who may allocate these funds to the service delivery areas or enter into agreements with other public agencies, nonprofit private organizations, and private businesses.

- **Title III--Employment and Training Assistance for Dislocated Workers**

Under title III, States are authorized to establish procedures to identify substantial groups of individuals with reemployment problems. These groups may include older workers who have encountered barriers to employment because of age (Section 302(a)(3)). States may seek assistance from the PICs to identify groups of dislocated workers.

Title III programs are administered by the States, generally with a 50/50 State/Federal match requirement. Except for statewide or industrywide programs, the PICs and chief elected officials have a 30-day period to review and make recommendations on title III programs operated in their area.

Employment-related services that are available under title III include financial counseling, commuting assistance, pre-layoff and relocation assistance, as well as employer and labor cooperative provisions for early intervention in the event of closure of plants or facilities.

- **Title IV--Federally Administered Programs, Part D--National Activities**

Part D of title IV gives priority to "older workers"--among other groups--in funding multistate programs that require technical expertise

available at the national level and that serve specialized needs of particular client populations.

The material in this guide is specifically geared to the local operation of 3 Percent Set-Aside Training Programs, but much of it can be used by any program serving older workers under the titles mentioned above.

The 3 Percent Set-Aside Training Programs for Older Workers

Section 124 of the Act describes the administrative structure and program emphasis required by the 3 Percent Set-Aside Programs. This section also specifies the eligibility criteria for participants.

Administrative Structure. Governors may enter into agreements for the operation of job training programs for older persons. These programs are to be developed in conjunction with appropriate SDAs, and should be consistent with the local job training plan developed for the SDA by the area's PIC and chief elected officials.

There will be a cross-section of program operators nationwide for the 3 Percent Set-Aside Training Programs using varied program designs. States are exploring a variety of funding avenues: some have issued requests for proposals (RFP's); some have allocated funds by formula to the service delivery areas; others are using the State Office on Aging or the State Department of Labor; and several have indicated they are using a combination of methods, including funding for research projects and for direct program services.

Program Emphasis. The program design should assure the training and placement of older persons in jobs with private businesses. Emphasis is on training for jobs in growth industries and in areas requiring the use of new technological skills.

Eligibility Criteria. Participants in job training programs under this section must be at least 55 years old and economically disadvantaged. The definition of the term "economically disadvantaged" is cited in Section 202(3)(B) of JTPA, which states that the individual or family income must not exceed the Office of Management and Budget (OMB) definition of the poverty level or 70 percent of the lower living standard income level as defined by the Bureau of Labor Statistics

(whichever is higher).

Program Activities and Limitations on Costs. Allowable program activities described in Section 204 of JTPA include some that are especially helpful to older workers--job search assistance, outreach to make people aware of and to encourage the use of employment and training services, attainment of certificates of high school equivalency (GED), on-the-job training, upgrading and retraining, development of job openings, and disseminating information to employers. However, cost limitations (Section 108) will affect not only the number of participants served, but also the types of services that can be provided and the overall objectives of the programs.

At least 70 percent of the funds must be spent on training; no more than a total of 30 percent can be spent for administration and support services for program participants with a 15 percent limit on administrative expenses. Regulations issued by the Department of Labor CFR Section 627.23 apply these restrictions to the establishment and administration of training programs for older workers under Section 124. The 15 percent limitation on administrative costs may not be waived, but the 15 percent limitation on support services may be waived by Governors under certain conditions such as an unemployment rate that exceeds the national average unemployment rate by at least 3 percentage points (Section 108 (2)).

The National Commission for Employment Policy

In 1982 the National Commission for Employment Policy began to examine government policies that influence the employment of older Americans. The employment problems of older Americans are considered a critical part of a national employment policy for the 1980's. With the aging of the labor force and the restructuring of the nation's industrial capacity, the importance of addressing the labor market problems of this group will increase in the decades ahead.

For a comprehensive review, studies were funded by the Commission and the Employment and Training Administration of the Department of Labor to analyze the following issues:

- o Participation in and the effectiveness of employment and training programs for older workers;
- o The effectiveness of innovative employment practices that contribute to increased opportunities for employment of older Americans in the private sector and the impact of government policy on their establishment;
- o The relationship between worker productivity and age;
- o The labor market behavior of older workers displaced from their jobs;
- o The cost to employers and the employment consequences of certain changes in the Employee Retirement Income Security Act (ERISA) and of shifting health care costs of workers over 65 from Medicare to employers;
- o Factors that influence the availability of part-time jobs for older Americans;

- o The labor market experiences of older Americans who are women and/or members of minority groups; and

- o The effect on retirement behavior of several specific changes in Social Security.

Based on these studies, policy recommendations have been developed by the Commission for the President and Congress.

PART TWO

PROGRAM PLANNING AND DEVELOPMENT

Introduction

The process for designing a program for training older workers has been divided into the planning and development stage. The planning stage concentrates on acquiring information about older workers and employers that will be used in the development of the program design. Program operators may want to consider these four steps for program planning and development:

Step 1:
Determine the employment needs of older workers.

Step 2:
Develop an understanding of the barriers to employment that older workers face.

Step 3:
Review techniques to increase employment opportunities for older workers.

Step 4:
Determine appropriate strategies for placement of older workers in the local job market.

Chapter 1 discusses these steps as they relate specifically to older workers. Chapter 2 discusses these steps as they relate to private employers.

Chapter 1

PROGRAM PLANNING AND OLDER WORKERS

Step 1: Determine the Employment Needs of Older Workers.

This examination of program planning and older workers will begin by considering some demographic trends and their effects on the workforce. The labor-market problems of older workers in general are discussed as well as problems faced by specific groups of older workers. Suggestions are given for addressing the employment problems of these groups.

Demographic Changes and Their Impact on the Workforce

One out of every five Americans is now age 55+. By the turn of the century, the actual number of people age 55+ is expected to increase by 20 percent, from 47 million to 55 million. The population age 65+ will increase slowly in this century from its current level of 12 percent of the total population to about 13 percent by the year 2000, but will jump to nearly 20 percent by 2025 (Sandell, 1983). In contrast, the U.S. population between the ages of 16 and 24 peaked at 37 million in 1980 and is expected to drop sharply in the next 20 years. Declining birthrates and longer life expectancies have combined to increase the percentage of older Americans today and in the future.

These demographic trends are producing some changes in America's workforce. The Bureau of Labor Statistics (BLS) projects a labor force of some 125 million by the end of the current decade. The typical worker then is expected to be older, better educated, and more likely to live in an rural area than today's worker (8th Annual Report, National Commission for Employment Policy, 1982).

The increased numbers of older persons in the population is not necessarily being duplicated in the labor force. As the post-World War II "baby boom" generation matures, the age of workers grows older, but persons age 55+ are not staying in the workforce longer. A startling projection made by BLS is that by the year 2000 about 80 percent of the people age 55+ will be **out** of the workforce (Fullerton, 1983). This, of course, raises many questions about how American society can support this number of nonworking people.

Older men have accounted for most of the decline in labor-force participation. In 1980, about 46 percent of the men age 55+ were working. This figure contrasts with almost 69 percent in this age group employed in 1950, an enormous drop in 30 years.

Conversely, the participation of women age 55+ in the labor market has increased slightly since 1950, when almost 19 percent worked; in 1980, about 23 percent were employed. Even though more older women are working, the actual number is still significantly lower than that of older men.

The changes in employment patterns for people age 65+ have been even more dramatic. In 1981, about 4 million people age 65+ were working--about one-half of these parttime. In other words, fewer than one man in five and only one women in twelve in this age group worked in 1981 (Sandell, 1983). And life expectancy is projected to continue rising throughout the last decades of this century and into the next. According to BLS, life expectancy for women will rise from 78 years to 81 years in 2005; during the same period men's life expectancy will increase from 71 to 73 years (Fullerton, 1983).

How do these general demographic trends relate to programs under JTPA?

1. This information familiarizes JTPA program staff with general

employment patterns of older workers over the past 30 years and conditions in the current labor market.

2. The information partially explains the American attitude that older people do not have to work because Social Security and pensions provide adequate financial support.

3. The information reveals that as more older workers leave the workforce, employers have less contact with them; subsequently, employers may become less inclined to view older workers as a resource for future employees.

This information may be considered when developing employment and training programs for older workers.

The Labor-Market Problems of Older Workers

For purposes of training programs for older workers designed under Section 124 of JTPA, the term older worker is defined as a person aged 55+. The problems and experiences of people in this age group will be emphasized here, but there is evidence to suggest that employment problems for older workers could begin as early as their 40's. Thus, some applicants for older-worker training programs under JTPA may have first experienced employment difficulties in their 40's, while others may be members of groups who have experienced lifelong labor-market problems. Particular groups considered are: (1) economically disadvantaged people, (2) workers who have been displaced, (3) older women who have never been in the labor force or have been out of it for a long time and wish to enter or reenter it after many years of homemaking, (4) members of minority groups, and (5) people with health limitations.

Before discussing the employment needs of each of these groups and the implications for program planning, it is important to mention "discouraged workers" --people who want to work but are not seeking employment because they believe they cannot find jobs.

Even though the unemployment rate for older workers is often lower than the rate for the general population, research has found that when older workers lose their jobs, it takes them longer to find another one; hence, they often constitute a disproportionate share of discouraged workers. In 1980, for example, if discouraged older women had been included in the unemployment rate for women age 65+, the rate would have been 7.4 percent instead of 3.1 percent (Rones, 1983). The unemployment rate is one indicator of the employment needs of older people, but it may be more representative if the large number of discouraged workers were included in the rate.

A report prepared by the House Select Committee on Aging states,

"On the personal level, the effects of unemployment on older workers are more severe than on other age groups." Long-term unemployment often contributes to mental and physical health problems. Since older workers are most likely to be among the long-term unemployed, they have a greater chance to "experience high blood pressure, high cholesterol rates, ... and greater incidences of stress-related diseases such as diabetes, peptic ulcers, gout, hypertension, and even arthritis." Longer unemployment can also increase "the likelihood of depression, low self-esteem, anxiety and tension, insomnia, anger and irritation, resentment and suspicion" (U.S. House Select Committee on Aging Report, 1982).

Economically Disadvantaged Older Persons

Older persons who are economically disadvantaged often have had long-term problems in the labor market. The fact that people are eligible for Federal employment and training programs is generally an indication of some of these problems.

One study sponsored by the Commission examined the participation of economically disadvantaged older Americans in the Comprehensive Employment and Training Act (CETA) and in the Senior Community Service Employment Program (SCSEP). This research focused specifically on title II-B, the main training component of CETA.

This study is particularly relevant to training for older workers under JTPA because it evaluated the results of training for older workers under CETA title II-B, estimated the number of older persons eligible for CETA and SCSEP, and provided information on the characteristics of the eligible populations, and reviewed participation rates for the SCSEP, which provides part-time employment for low-income persons age 55+.

First, the similarities of these programs to JTPA are examined and then the findings of this study are related to planning issues of the 3 Percent Set-Aside Programs under JTPA.

CETA title II-B had two rules for eligibility: (1) the person had to be economically disadvantaged **and** (2) the person had to be unemployed, underemployed, or in school. The definition for economically disadvantaged person under JTPA remains the same as for CETA, that is, a person is treated as economically disadvantaged if the family income is at or below the OMB poverty level, or is 70 percent of the BLS lower living income standard. However, JTPA does not have CETA's unemployment criterion.

Participation of Older Workers in CETA

Approximately 23,000 people age 55+ were trained under CETA II-B during 1980. Table 1 presents the distribution of participants by age group.

TABLE 1

PARTICIPATION OF PERSONS 55 YEARS OF AGE AND OVER IN CETA TITLE II-B

AGE	NUMBER OF PARTICIPANTS	PARTICIPANTS AS A PERCENTAGE OF ELIGIBLES	PERCENTAGE OF PARTICIPANTS AGE 55 AND OVER
55-61	16,200	1.0	70.7
62-64	2,700	0.5	11.8
65-70	2,700	0.3	11.8
71+	1,300	0.1	5.7
TOTALS	22,900	0.5	100.0

(Source: Rupp et al., 1980 data.)

These statistics indicate that the largest group of participants age 55+ for training under CETA were the 55-61 age group--persons who are ineligible for Social Security retirement benefits. It should not be assumed, however, that eligible people age 62+ will not be interested in or need training and employment services.

Eligibility of Older Workers in CETA

The following findings (Rupp, et al., 1983) about older workers eligibility for CETA II-B may interest program operators under JTPA:

- Almost 5 million people age 55+ (10.7 percent of the total population that age) were eligible for CETA title II-B.

- Estimates based only on **family income** meeting the economically disadvantaged criterion showed that 43.9 percent of the population age 55+ would have been eligible for CETA. In other words, when the unemployment criterion was omitted, the percentage eligible for the program included almost one-half of the population age 55 and over. However, it is unrealistic to expect that all persons in this group would be interested in training and employment or be able to work.

- About 35 percent of the eligible persons were age 71+.

- More women were eligible than men.

- Older minority persons were four times as likely to be eligible as whites.

The following table presents the distribution of older persons eligible for CETA II-B by age.

TABLE 2
ELIGIBLE PERSONS 55 YEARS OF AGE AND OVER
FOR CETA TITLE II-B IN 1980

AGE	NUMBER OF ELIGIBLES	ELIGIBLES AS A PERCENTAGE OF TOTAL POPULATION	PERCENTAGE OF TOTAL ELIGIBLE PERSONS 55+
55-61	1,717,000	10.8	34.7
62-64	523,000	8.9	10.6
65-70	984,000	9.6	19.9
71+	1,727,000	12.0	34.8
TOTALS	4,951,000	10.7	100.0

(Source: Rupp et al., 1980 data)

As can be seen, while the population age 71+ made up almost 35 percent of the eligible population, only 5.7 percent of the CETA II-B participants were age 71+. There may be various reasons for this low rate of participation: health problems, lack of desire for work, discouragement, no public transportation, age discrimination on the part of the program sponsors, etc. If JTPA program sponsors are going to be advocates to employers about the value of older workers, program sponsors need to review their own procedures to ensure that the older age groups have access to training.

Implications for JTPA Programs

Before designing a training program, planners and administrators need to know the general characteristics of the eligible population to be served and the labor-market problems this group encounters, and their supportive service needs.

The above data on eligibility demonstrate that:

- The percentage of persons age 55+ meeting the eligibility criteria for JTPA may be extremely high (potentially this group could be anywhere from 10 to almost 50 percent of the total population age 55+).

- Although one-third of the eligible population may be in the upper age groups (71+), many of the persons in this age group may not want to participate due to health and other personal problems.

- It is likely that a higher percentage of older women than older men will be eligible for JTPA programs, thus the recuritment process and training activities may have to be designed with the particular needs of older women in mind.

- It is likely that a high percentage of older minority persons will be eligible for JTPA programs, thus an investigation into the employment barriers faced by this group would be advantageous to planners and administrators before planning and designing programs and services.

Also, methods of selection may need to be considered in the event that there are more eligible applicants than the program can serve. This is likely to happen in many local areas.

Some factors that can be considered for screening or selecting applicants for JTPA program service are: demographic characteristics, basic literacy and computational skills, job readiness, and motivation (Trego, 1984). These factors need to be considered carefully when applied to older persons. For example, job readiness and motivation may be difficult to accurately assess for the discouraged older worker who has had a long spell of unemployment.

Using demographic characteristics, programs can establish goals for serving different population subgroups of older workers (i.e., women, minorities, etc.).

One older worker project in Minnesota found that many of the older workers participating in the program were discouraged; however, with encouragement as a primary counseling tool, older workers were urged to take positive steps. By the end of the project, the placement rate was 71 percent (Henry and Teschendorf, 1984).

Because of required prerequisites for training in some occupation fields, basic literacy and computional skills become important. However, caution should be used if a program decides to use basic skills as a screening device. Often, those most in need will also be deficient in reading and writing ability. The San Diego Older Workers Project, which provided occupational skill training to 60 older trainees in 14 different occupation areas, referred some participants to basic education classes first to increase the participants' reading, math and/or language skills to the functional level required for their occupational objective. The occupational training for this project included such areas as electronic testing, word processing, accounting, graphic arts, solar energy installation, typing, child care, food service, and electronic assembling.

Anxiety may be an obstacle for some participants trying to pass the GED test. Some displaced homemaker programs found that displaced

homemakers benefitted most from educational preparation classes held in a group setting.

Consider means of upgrading the basic literacy and computational skills of the older applicants in dire need of employment and training services. If possible, use local resources (i.e., adult high school programs, volunteers such as retired teachers, etc.).

Often, with the older population, the accessibility of the program in the local area and tc available transportation services will influence who becomes an applicant and who receives program services. Some older people do not drive or do not have the financial assets to maintain an automobile. In many small cities and rural areas, often there is no public transportation. This prevents many older persons from taking advantage of training and employment opportunities.

Legal and regulatory requirements dictate that those persons over 60 and those in the most financial need have priority over others for enrollment in the SCSEP program. Some CETA prime sponsors used a "ranking" system to establish a list of those participants most in need and who would be enrolled first. Regardless whether a 3 percent program sponsor uses one or all of the above factors (or others) for selecting applicants, a decision needs to be made early in the planning process because of its impact on program design.

Research Findings. The results of the Commission-sponsored study on older workers' participation in employment and training programs showed strong links between some characteristics of older people and their participation in CETA (Rupp et al., 1983). Persons with long unemployment spells (27 weeks and more) whose family income was well below the poverty level were the most likely to participate in CETA. Among people with similar characteristics, older men tended to participate more than older women, except in the case of widowed persons, among whom older women were more likely to participate than older men.

The more education a person had, the more likely that person was to participate in CETA. Older persons in general were less likely than younger people to participate in CETA. Only 0.5 percent of the eligible persons age 55+ participated in CETA, compared with 4 percent of the persons in the 22-44 age group. The researchers (Rupp et al, 1983) suggested that "the higher rates of nonearned income among older persons, the lower education attainment, and lower labor-force participation accounted for about one-third of this difference in participation rates. Age discrimination also may have been a subtle factor in the lower participation of older workers." Some CETA prime sponsors whom researchers interviewed suggested that the "youth mandate" under CETA as well as that program's performance standards made it difficult to serve older people (Reesman et al.,1983).

Age and poor health had a strong negative link with CETA participation. Poor health in itself, not the benefits received because of the illness/disability, discouraged participation in employment and training programs, even though the handicapped were given preference in the eligibility criteria. Targeting of this subgroup did not lead to large numbers of handicapped persons entering the program.

The authors of this study noted that modifications in the program

design and supportive services, as well as outreach efforts, might have increased participation for persons with health limitations and those in the older (71+) age groups (Rupp et al., 1983).

For the older persons who did participate in CETA, the training resulted in increased earnings of $400 annually, and added almost five weeks of employment in the postprogram period of 52 weeks. (This picture is similar to the earnings and employment gains of youth participating in Job Corps which is considered one of the more effective training efforts.)

Implications for JTPA Data Collection

Although this study analyzed national statistics from the CETA program, it provides information on general program trends. For instance, it appears likely that a fairly large percentage of the population age 55+ will be eligible for the 3 Percent program, including many older women with very low income levels and older minority people in the community who need training and employment assistance. Since funding restricts the number of older persons who can be served, program designers will therefore need data on the general population age 55+, the population age 55+ with income at the poverty level, the population age 55+ with family income at 70 percent of the BLS lower living standard, and the distribution of the eligible population by sex, age, minority status, and education. Potential sources for the data include 1980 Census, Bureau of Labor Statistics, State Offices on Aging and Area Agencies on Aging, State and local planning agencies, and State and local economic development agencies.

The findings from the study on older workers' participation in CETA do not necessarily predict participation outcomes in JTPA programs for older workers, but raised issues which planners may wish to consider.

It is important to review these factors related to the training of older persons under CETA in order to address recruitment and outreach, program design, and supportive services for the older workers under JTPA. As stated earlier, targeting a particular group alone will not necessarily mean that the program will achieve its goal; planners must also consider the special employment and training needs and labor-market problems faced by the group. This is the reason the findings of the CETA study are discussed within this guide and information is given on different groups within the older population and the need for various training options and placement techniques.

Program administrators and planners will have to decide on the employment strategies that are appropriate to address the needs of the eligible older persons in the local area and have the potential of sucessfully placing older participants in the local job market.

Research Findings on the Senior Community Service Employment Program (SCSEP)

The SCSEP is a national employment program funded under title V of the Older Americans Act. The program provides part-time employment for older workers in community service jobs and in recent years the Department of Labor has adopted a goal of placing 15 percent of the program's participants in unsubsidized employment.

Training opportunities are limited under SCSEP; its main function is as a community service employment program which provides participants with useful work experience. Participants may work up to 1300 hours per year, of which 20 percent, can be spent in formal training. Participants work in senior citizen centers, schools, hospitals, parks, programs for the handicapped, and home repair/weatherization and transportation services. Participants must be at least 55 years of age, have a family income not higher than 125 percent of the OMB poverty level, and have the physical capacity to work.

Presently about 78 percent of the funds go to eight national sponsors and 22 percent to the Governor of each State, who in turn designates a public agency or nonprofit organization to operate the program. The Office on Aging is the project sponsor in most States, but several Governors have assigned responsibility to one or more of the national nonprofit sponsors. These include Green Thumb, Inc., National Council on Aging (NCOA), National Council of Senior Citizens (NCSC), American Association of Retired Persons (AARP), National Caucus and Center on Black Aged (NCBA), National Association for Spanish-Speaking Elderly (ANNPM), the National Urban League (NUL), and the U.S. Forest Service (USFS).

Research (Rupp et al., 1983) has shown that almost one-fourth of the U.S. population age 55+, or about 11.5 million people, met the

eligibility criteria for this program in 1980; more than 50 percent of the black population age 55+ was eligible as well as 44 percent of the older Hispanic population. As was the case with CETA, more women than men were eligible, and the eligibility rate increased with age; almost 75 percent of the eligible people were age 62+.

Over 77,000 older workers participated in the program in 1980, less than 1 percent of the eligible population. Funding in 1980 limited the number of slots for the program to 52,250. More than 65 percent of the participants were older women; widows were the most likely people to participate. Almost one-third of the participants were minorities. Some 62 percent of the SCSEP participants were age 62+. About one-third of the participants had an 8th grade education or less.

The SCSEP continues to operate; for fiscal year 1984 the program has an appropriation of $317 million to fund 54,200 part-time employment opportunities.

Both CETA and SCSEP have had positive impacts on the postprogram labor-market position of the older participants. For the program year that ended June 30, 1983, the SCSEP placed over 18 percent of the authorized participants into unsubsidized employment. This reflects favorably on training and placement efforts for older workers.

Program planners and administrators for the 3 percent set-aside programs under JTPA may find it beneficial to work closely with SCSEP project sponsors to coordinate program design, recruitment efforts, and placement activities. Ways of linking JTPA and SCSEP are discussed in some detail in Chapter 3 of Part Two.

Displaced Older Workers

Although displaced older workers are not specifically mentioned in Section 124 of JTPA, most programs will probably serve at least some members of this group. The more knowledge that program administrators and staff have about displacement, the better able they will be to develop appropriate services for this group. Displaced workers, also termed dislocated workers, are defined in Section 302 of JTPA as "individuals who:

(1) have been terminated or laid-off or who have received a notice of termination or lay-off from employment, are eligible for or have exhausted their entitlement to unemployment compensation, and are unlikely to return to their previous industry or occupation;

(2) have been terminated, or who have received a notice of termination of employment, as a result of any permanent closure of a plant or facility; or

(3) are long-term unemployed and have limited opportunities for employment or reemployment in the same or a similar occupation in the area in which such individuals reside, including any older individual who may have substantial barriers to employment by reason of age."

One Commission-sponsored study examined the labor-market problems of displaced older male workers. Using the National Longitudinal Survey of Mature Men, the authors (Shapiro and Sandell, 1983) found that:

- Older black men had a slightly greater chance of being displaced than other men.

- Nearly one-third of the men who lost jobs had held them for

more than 10 years.

- o Craftsmen and laborers were particularly prone to displacement.
- o Some displaced older men never obtained new jobs.
- o For a substantial number of older men, job loss is a recurring problem, and they keep moving from one short-term job to another.

This study found also that age discrimination appeared to be an important factor in wages paid on the new jobs obtained by displaced male workers age 65+. No evidence of age discrimination per se was found in the wages paid on new jobs obtained by displaced men under age 65 (Shapiro and Sandell, 1983).

Another study concerned with older workers' responses to job displacement and the assistance provided by the Employment Service found that displaced older men and women conducted more intensive job searches than other workers. They also experienced greater difficulty in finding new employment and were likely to remain unemployed after 6 months (Johnson et al., 1983).

The program implications from the research findings on displaced older workers are as follows (Johnston et al., 1983):

- o Workers with relatively few years of education (no high school diploma) had more severe reemployment difficulties than other displaced workers did.
- o Displaced workers who left long-term jobs had more problems in finding new employment than other displaced workers did, although psychological factors were not examined here.

- o Job referrals were most helpful to older women for whom they resulted in higher earnings and a shorter period of unemployment. Job referrals were helpful to displaced older men, but resulted in less increase in earnings than the increase women experienced.

- o Older women who conducted an intensive job search had a shorter spell of unemployment and higher earnings during the period reviewed. But older women with low confidence often quit looking for work entirely.

▲ Program planners may have to seek data on older displaced workers from different sources than other data. Possible sources are:

- o Firms having recent lay-offs or are in the process of closing down.

- o Employment Security data on displaced older workers receiving unemployment insurance compensation (UI). (These data may not include displaced workers who have exhausted their benefits or workers who were not eligible for UI benefits.)

- o Economic development agencies that may have acquired data to project local workforce needs.

▲ In program development, program operators can consider how to incorporate services to address some of these problems in their program design. Basic services could include:

- o Educational assistance for workers with less than a high school education. Since many employers consider a high school degree to be a basic requirement for a job, this step may open up some opportunities.

- Development of a job referral system. Direct job referrals produced results for both displaced men and women. Job referral systems will be discussed in more detail in Step 4 of this chapter.

- Individualized plans for workers laid off from long-term jobs. Services could include testing and career counseling to determine a new field or industry to enter; skills training, if needed; supportive services (efforts to prevent older persons from becoming discouraged); and direct job search assistance.

- Support services for older displaced women--along with training in conducting an effective job search--to help these people continue their job search until they are successful.

- Referrals to dislocated worker programs being operated in the community under title III of JTPA. Older workers are mentioned as a group to be served under title III. However, there is a State match requirement for title III, which has been difficult for some States to raise, thus initially limiting the availability of the program. Contact the State JTPA administrator to get specific information on the location of title III projects within the State.

Older Women

Like the older population in general, older women are not a homogeneous group. The female client population for the older worker training program under JTPA will probably include older employed women who have a history of very low earnings or intermittent unemployment or both; women who were recently displaced because of cut-backs in and closings of businesses and industries; and displaced homemakers--women whose primary role of homemaking has changed following the death of, or separation or divorce from, a spouse. Displaced homemakers may never have participated in the labor force or may be reentering the labor market after a long period of raising children and homemaking. A review of older participants in CETA training found a high likelihood for widows to participate in Federal employment and training programs (Rupp et al.,1983). Even though these women have different backgrounds and experiences, they face similar barriers in finding employment.

Older women are a large potential source of JTPA applicants. The average age of widowhood is 56, seven out of ten women age 55 or over live alone, and more than one-third of all widowed, divorced, or never-married women in this age group have incomes below the poverty level (Snyder et al., 1984).

Older women who become widows or are divorced from their spouses are experiencing perhaps the major upheaval in their lives, and frequently the changes they experience involve assuming responsibility for their own livelihoods. Their personal situations, however, may make it difficult for them to make decisions about work and training, or to prepare for and sustain a job search. Some displaced homemakers have a very narrow view of the world of work. They may be trying to choose careers from among a set of jobs they knew were available to them 20 to 25 years ago (Displaced Homemaker Program Options, 1983).

Another problem which often hampers the older displaced homemaker

in the pursuit of a job is unmet health care needs. A survey of participants in various displaced homemaker programs funded under CETA title III found that approximately 70 percent of these women had a health problem that needed medical attention. Often, these were dental and eye problems (Berkeley Planning Associates, 1981). Unfortunately, many divorced or widowed older women have lost their health insurance coverage, and those who are not yet eligible for Medicare often find it financially difficult to buy insurance to cover basic health needs.

Some women in this age group may face the problem of the "dependency squeeze"--when a woman still has a child in the home to care for and has elderly parents who need help (Soldo, 1982). It is not uncommon to see a 55 year-old woman caring for her 75 year-old mother. For these women, the "dependency squeeze" may add to the pressures of finding and retaining employment.

Most older women who have participated in the labor force have worked in low-paying jobs with limited training opportunities and career mobility. One study showed that, on average, women's earnings never rise as high as men's earnings, although women's earnings peak later (at 55 for women versus age 50 for men) and decline more slowly. Analysts disagree whether this pattern results from discrimination against women, which increases with age, or from the cumulative effect of women's historical lack of access to training opportunities on the job over a working lifetime (Clark, 1983).

Older women have tended to work in industries or services and retail trade, in nonunionized firms, and in small companies where private pension coverage is less prevalent than elsewhere. Thus the financial need of these women may limit the amount of time they can devote to training.

Displaced older women were found to conduct intensive job searches, but those who had little self-confidence dropped out of the

labor market by simply stopping their job search (Johnson et al., 1983).

The National Policy Center on Employment and Retirement at the University of Southern California reports that older women reentering the workforce need more than technical training. Work-related attitudes and skills including confidence building and networking are among the skills that are lacking and need to be developed (Gollub, 1983).

▲ In planning programs which will address the employment needs of women 55 and over, some basic facts are needed by JTPA planners:

- How many older women meet the eligibility criteria for JTPA 3 percent programs? What are their ages and ethnic backgrounds?
- How many women 55+ are receiving welfare assistance, food stamps, and/or medicaid?
- What kinds of industries/businesses and occupations are older women (age 55+) currently employed in? What is the average wage for these women and average number of working hours?

▲ Program operators can consider some of these factors in program design:

o **Recruitment.** The Commission-sponsored study evaluating federally-funded employment and training programs found that older men, after taking into account personal characteristics, were more likely to be CETA participants than older women. Program operators can periodically assess their recruitment efforts to determine if they are reaching older women, and if services are adequate to assist older women in fully participating in the program.

If the program is having difficulty recruiting older women, evaluate program advertisements and the audience they are reaching. For example, placing posters in places where women often go may help as well as avoiding the use of certain words like "experienced". Older women often do not consider themselves to be "experienced" workers. Also, those women already enrolled in the program may have advice on how to reach more women in the local area.

o **Comprehensive Intake Procedures.** Comprehensive intake procedures for older women may result in a more effective program and higher placements. At the time of intake, practitioners can help older women assess their employment needs, can determine the women's knowledge and attitudes toward work, and can discover the skills the women may have that can be upgraded. Practitioners can help older women who have never participated in the labor force to identify the skills and insights they have developed in the home which are transferrable to the world of paid employment. Any experience in volunteer work and civic duties outside the home should be taken into account. For example, women who fix the appliances at home might be considered for training

in small appliance repair. Women who have kept the financial records for civic groups may with some training have the skills to work in an entry-level accounting position (Displaced Homemaker Program Options, 1983).

Practitioners should assess each participant's educational achievement as well as her ability to adapt to change. Even for women who are entering the traditionally female-dominated field of clerical-secretarial work will need to be prepared to master word processing and other new office machinery.

o **Vocational Exploration.** Introducing older women to nontraditional alternatives in the job market will ensure that these women get an accurate picture of the advantages and disadvantages of nontraditional work. Program staff can prepare written information on different types of work, including salaries, hours, location, requirements for hiring and training. Staff should avoid suggestions that reflect their own biases and attitudes; for example, nursing care is a growth industry that may or may not be appropriate for certain older women.

Program staff can arrange for women who have never participated in the labor force, or have not worked outside the home in 20 years, to visit local offices, factories, and other workplaces where they can observe the work environment. Displaced homemaker programs operating under CETA have found that program participants gain confidence if, before they enter training, they are encouraged to talk with other women in a particular vocation and have a chance to do a task such as drafting, laboratory work, or typesetting (Displaced Homemaker Program Options, 1983).

o **Supportive Services.** To enable the older woman with a low family income to participate in training under JTPA, program operators will need to consider ways of meeting the various supportive service needs of these women such as transportation, financial aid, food, clothing, health care, and counseling. Some potential sources of assistance are local churches (some operate food and clothing banks), foundations (community foundations and others located within the State), United Way, Soroptimists, Junior League (some 20 Junior League groups are taking an active part in working with displaced homemakers programs around the country), large corporations, and any other local group that may be willing to provide financial or other assistance (Trego, 1984).

Needs-based payments (Section 204 (27)) are allowable under JTPA if they are necessary for a person to participate in the program. These payments must be made in accordance with a locally developed formula or procedure. The requirements of the State for 3 percent programs may also extend to needs-based payments. The JTPA 30 percent cost limitation includes administrative costs (limited to 15 percent), supportive services, needs-based payments to participants, 50 percent of work experience expenditures which meet certain requirements, and 100 percent of work experience expenditures which do not meet the requirements in JTPA. Due to these restrictions, programs for older workers may have to seek assistance from community resources (e.g., some women's groups have provided stipends to older women who were being trained to reenter the workforce).

Programs will have difficult decisions to make about need-based payments to participants because of the limited funding and the JTPA cost limitations. In a recent study of 57 SDAs, it was found that almost one-half of the sample SDAs

were not allowing needs-based payments. Others, like the Seattle SDA, for example, required that a participant be in JTPA for four weeks before being eligible for a needs-based payment (usually $6.00 per day). Others are establishing contingency funds for special needs, requiring a case-by-case review (Walker et al., 1984).

Older Minority Persons

If eligibility for a Federal employment and training program is a sign of labor-market problems, then the eligibility rates for older minority persons for CETA and the SCSEP indicate some serious problems. In fact, eligibility for CETA title II-B was higher for minority groups than whites in every age group, as this table shows:

Table 3:
Percentage Eligible for CETA title II-B

Age	White	Black	Hispanic	Other
14-21	12.0	40.8	30.4	26.9
22-44	10.6	31.4	25.7	19.5
45+	7.4	30.6	25.8	19.5

(Source: Rupp et al., 1980 Data.)

For the SCSEP, the differences in eligibility rates for older minority persons is even greater. Almost 55 percent of the black population age 55+ is eligible and 44 percent of the older Hispanic population, compared with an eligibility rate of 21 percent of the white population.

A Commission-sponsored study on the labor market problems of minority groups found that the earnings rate of minority men appears to peak at about the same time the rate peaks for white men, but minority men, on average, **never** earn as much as white men (Clark, 1983). Another study concluded that older black workers have had labor-market problems beginning early in their worklife, but that this effect does not become greater as they age (Kohen, 1983).

Nevertheless, older minority persons face significant barriers in obtaining employment. Some of these are:

- o Lower educational attainment often due to discrimination during early life.
- o Early experience on jobs--placed in low-paying jobs with little mobility.
- o Lower labor-market participation rates and greater likelihood of becoming discouraged and dropping out altogether.
- o Succession of low-wage jobs resulting in little stability in job history and less opportunity to obtain training for job advancement.
- o Language barriers.

The problems are compounded for older minority women; a recent study by the Institute of Gerontology at the University of Michigan reported that seventy-eight percent of Hispanic women over age 65 live near or below the poverty level, and about two of every three older black women who are the head of the household have serious health problems (Snyder et al., 1984). These problems often limit the type of work they can do.

Another problem which faces the older minority population is the lack of education. Almost 80 percent of black men and women aged 65 and over have not completed the 9th grade. The National Caucus and Center on Black Aged reports that the average education for black participants age 55-64 in their SCSEP program is 9th grade, for Hispanics in this age group the average education is 7th grade, and 8th grade for the Indian participants.

▲ JTPA program operators should be aware that they may need to reach out to the older minority community to make sure that people learn about the training programs and to provide for remediation in reading

and math as well as job skills training.

JTPA program operators are encouraged to seek information (planning statistics) on the older minority population and input on training design from local chapters of minority organizations such as the National Caucus and Center on Black Aged, The National Urban League, The National Association for Spanish Speaking Elderly, and the Association for Asian Americans. Refer to Appendix C for addresses of the national headquarters of these organizations where information on local chapters can be obtained.

Older Persons With Health Limitations

One Commission-sponsored study (Clark, 1983) found that the earnings of people with health limitations peak sooner and decline more with age than people with no health problems. Earnings of persons with health problems also tend to be less influenced by improving economic situations, and they generally have lower earnings throughout their lifetime.

Persons in poor health are more likely than others to leave the labor force, which accounts for large decreases in their income (Kohen, 1983).

The following are health problems often reported by older workers to program staff: arthritis, elevated blood pressure, diabetes, back problems, hearing impairment, and obesity.

▲ JTPA program operators should be aware that there may be a need:

- o To ensure that recruitment and outreach efforts are structured in a manner that affords accessibility for handicapped persons.
- o To design publicity about the program to emphasize that older persons with health limitations can be trained and retrained.
- o To work with private-sector employers on job tasks that can be accomplished productively by persons with certain health limitations.
- o To establish a working relationship with vocational rehabilitation agencies and community mental health centers as some physical problems can lead to emotional stress and vice versa.

There is additional information on health problems under Step 2 in this chapter.

Summary

Basically, Step 1 has described research and background information on the employment needs of older workers. Because older workers are not a homogeneous group this can be complex. However, time and effort spent in planning and developing a program design that incorporates the needs of various groups older workers will pay off in long-term program results (i.e., higher placement rates, more effective training).

Step 2. Develop an Understanding of the Barriers to Employment Faced by Older Workers.

Researchers at the Institute of Gerontology at the University of Michigan (Root and Zarrugh, 1983) have grouped the problems that older workers face into four general categories of barriers to effective employment:

- o Negative self-images that limit employment opportunities and advancement on the job.
- o Minor disabilities that may force older persons out of positions for which they might otherwise be well-qualified.
- o Exclusion from training opportunities that would enhance prospects for continued employment.
- o Limited options for part-time employment.

How can JTPA programs be structured to help older workers overcome these barriers?

Negative Stereotypes. Older workers may have low self-images as a result of accepting the negative stereotypical view of older workers as being slow to change and having a diminished capacity for learning. Some CETA prime sponsors who provided job search training reported that older people became discouraged more quickly in their job search than younger participants. A negative self-image may have contributed to this discouragement.

If training programs and placement are to be successful, older participants must enter training with a positive attitude about their ability to learn and to develop coping mechanisms for the job search after training.

▲ JTPA program operators can take these actions:

- o Develop activities to build up the confidence of older workers before placing them in training or job search. For example, older worker projects have used some of the following techniques to help older workers increase their self-confidence and develop a positive attitude: role playing and rehersal, assertiveness training, video taping of interviews, modeling of effective behavior by program staff, offering consistent encouragement, teaching realistic self-evaluation methods, and providing information on how to deal with depression and anger during unemployment.
- o Encourage positive images of older individuals by using available resources in the community such as public service announcements on radio and TV.
- o Work with the education community to emphasize the need for lifetime learning and career planning and thus reduce the stigma older persons may face in training. According to estimates by the Bureau of Labor Statistics, three out of four jobs will require some technical training beyond high school by 1990. This statistic implies that people of all ages need to become accustomed to updating their skills and becoming retrained.

Health Considerations. During a conference sponsored by the Commission in January, 1983, two health issues were discussed: (1) a person who has poor health is not incapacitated for every type of work activity; and (2) even with medical information, an employer must still decide whether or not a worker can meet the requirements of a certain job (Parnes, 1983).

The influence of health on work and retirement depends on several interrelating factors such as the demands of the job and the nature and severity of the health problem, the individual's prior work experience,

and potential income for retirement (Parnes, 1983).

▲ JTPA program operators can take these actions:

- o Discuss with older participants the nature and severity of any health problems, their work experience, and current financial needs to assess how their health limitation may influence their ability to perform various job tasks. Older participants need a realistic assessment of their physical capacities before initiating a job search. In the case of an applicant who is unable to provide much information about his/her physical condition, it may be helpful to obtain a medical statement from a physician. There may be some applicants who have not seen a doctor in many years, and who do not have the financial resources for a medical examination. In these cases, program staff can utilize linkages to public health departments and vocational rehabilitation to help the applicant obtain an examination. In some areas, local physicians have been willing to accept a few older persons referred by SCSEP sponsors on a limited fee or no cost basis as a public service. Inviting a doctor to serve on the program's advisory committee is one way of establishing a contact in the medical community. That person may also be able to offer advice on general health issues affecting older workers.
- o Establish linkages with other agencies that can help program participants with health problems (vocational rehabilitation agencies, local health clinics, veterans programs, and social service agencies).
- o Discuss with employers the level of skills, knowledge, and abilities needed to meet certain job requirements. Older workers who meet the level of competency through training have a better chance of being judged according to their abilities, rather than by their age or particular health limitation.

Lack of Training Opportunities. Policies that view older workers as "old dogs who can't learn new tricks" may become self-fulfilling prophecies. Researchers at the University of Michigan (Root and Zarrugh, 1983) point out that although there is some validity to the idea that older workers who have been out of the classroom for 30 years may have lost the habits necessary to the traditional learning process, new teaching techniques are available and are increasingly recognized as effective with older workers.

▲ JTPA program operators can take these actions:

- o Look for programs in the community that have trained older adults. Examine the successes as well as the training problems encountered and how the problems were addressed during the training period.
- o Contact adult education or continuing education departments within colleges and universities for information on adult learning methods. A professor interested in adult education may be asked to be an advisor on training techniques for the program.
- o Assure that trainers have had some experience with teaching older adults or have received training in adult education.
- o Assess the competence of trainers to use new techniques which incorporate adult learning methods.

(Adult learning methods are also discussed in Step 3 of this chapter.)

Limited Part-time Employment Options. A recent survey sponsored by the National Council on Aging found that almost 80 percent of workers age 55+ preferred part-time employment to complete retirement (Harris, 1980). Despite these expressed interests, most workers go from full-time employment to complete retirement.

A Commission-sponsored study on part-time employment opportunities for older workers found that this country's limited numbers of older workers in part-time jobs were concentrated in a few industries--agriculture, service, and finance/insurance/real estate. Partial retirement was found to be rare in manufacturing, public utilities, and government (Jondrow et al.,1983).

This study concluded that employers find part-time workers of any age to be more costly per hour and less productive than full-time workers. According to the study, employers believe that shorter hours by more employees increase their labor costs, because they involve increased hiring costs, payroll preparation, employee benefits, training and other administrative work. Consequently, people who work part time will be offered an hourly rate lower than the rate for full-time work (Jondrow et al.,1983).

Conversely, another study reported that employers who have a demand for flexibility in scheduling because their workload fluctuates are increasingly viewing older workers as a valuable resource (Root and Zarrugh, 1983). Older people who have fewer family responsibilities may be more willing than others to have irregular work schedules, or to work periodically in the evenings or on weekends.

Participants in training programs under JTPA may prefer part-time work because their income from Social Security does not meet their financial needs or because their health does not permit them to work full time or both. Thus helping older workers find part-time employment may be a program objective.

▲ JTPA program operators can take these actions:

- Examine the composition of businesses and industries within the community to determine the potential for part-time employment, and locate employers who have peak worktimes that would require

more employees. Consider the industries listed earlier which have already shown an interest in shorter hours--insurance, real estate, banking, service firms, and agriculture. For example, a Missouri Area Agency on Aging has been working with supermarket chains to promote older workers for permanent part-time employment. And a survey completed in Los Angeles found that 57 percent of employers interviewed were interested in using skilled older workers on a part-time basis (Gollub, 1983).

- Review labor market data gathered by the Employment Service Office or the State Occupational Information Coordinating Committee for information on part-time employment. If this information is not available, find out whether the Chamber of Commerce in the area would be willing to survey its members about their interest in older workers who could work on a part-time basis.

- When talking with employers, stress that the programs under JTPA will be recruiting older persons and training them, thereby reducing costs for employers.

- Discuss with business representatives the feasibility of promoting the hiring of two part-time employees in place of one full-time worker. To avoid some of the problems that employers have complained of concerning part-time employees, emphasize efficiency, commitment, and the need for close coordination with another person when training participants for sharing one full-time position (Jondrow et al., 1983).

- Establish linkages with Senior Community Service Employment Program sponsors in the area and take appropriate referrals for training. The SCSEP provides part-time employment for low-income persons age 55+.

Summary

Step 2 outlined some of the barriers to employment faced by older workers and some techniques for helping the participants to overcome these barriers. While programs will never be able to completely eliminate employment barriers, taking an active role in addressing them, and helping the older worker to overcome or at least adjust to the barriers, will result in more positive program results and may actually be the most productive of all program activities.

Step 3. Review Techniques to Increase Employment Opportunities for Older Workers

This section concentrates on techniques to help older workers increase their opportunities for employment. Different approaches to training and education will be discussed.

Basic Questions About Training for Older Workers

The emphasis in JTPA is on training to increase employment and earnings and reduce welfare dependency. There is scant research available on curriculum development and training models for older workers, but what program operators may want to consider in making their initial plans for training will be discussed here.

Training programs must be so designed that they are attractive to older persons and thus will induce them to participate. Training programs also must be linked with employers to create jobs and work arrangements suitable to employers and older workers. Some of the basic questions to be answered during the planning stages are these:

1. What skills must be learned during training?
2. What industries and businesses will hire older workers with these skills?
3. What are the best methods of training older workers?
4. What are the attitudes of older workers toward training?
5. What attitudes will employers have toward hiring older trainees?

Questions 1 and 2 must be answered together with the information that local employers can supply. Knowing local employers and their needs is important because the mobility of older workers generally is limited--due to their having a home with a mortgage, family, friends, and many other ties with a locale that make geographic relocation

difficult. This does not mean that some older persons would not move for better opportunities in the job market, but that the local job market should be the primary target when training is planned.

With the information obtained from employers and labor-market information from public agencies, JTPA program operators can develop a list of the specific types of jobs older workers can be trained to do and the specific skills to be learned. It is important that program operators not rely solely on labor-market information. For example, an employment and training program in Texas learned that the building trades were identified as a growth industry in a recent labor-market survey, but investigation revealed that there were few jobs in this field that interested older workers or suited their physical capabilities. Thus training for older workers in this area would probably have been fruitless. This labor-market survey also showed growth for computer-related jobs. Training was provided to older workers in data processing, resulting in a placement rate of 65 percent.

Before any training is planned, the job requirements should be carefully discussed with potential employers. Employers can also advise on the content and sequencing of training materials and on effective methods of training for developing certain skills.

It is important to advise older people entering training of what they are to learn and what their performance requirements will be. Some older adults tend to approach new situations with caution. Informing them about what they can expect from the training may alleviate some tension. This cannot be done unless the training is designed to teach specific skills at an identified performance level.

As for question 3 concerning the best methods for training older workers, researchers in England (Belbin and Belbin, 1972) who have studied the problems in retraining older workers have summarized their

findings in this way:

- Persons of low learning capacity may have acquired a negative attitude toward training situations of a kind in which they have previously experienced failure.

- The training methods should provide rapid feedback regarding results.

- Adults must be allowed to find their own way of building on past knowledge and to use their own way of assimilating the new.

- Nonverbal learning is valued more than verbal learning among older trainees. Adult students have been found to learn through activating the senses. Basically, 75 percent of adult learning is through the sense of sight, 13 percent through the sense of hearing, 6 percent through the sense of touch, 3 percent through the sense of smell, and 3 percent through the sense of taste. When a trainer uses **both** words and pictures, adults can retain about 6 times more than if the trainer uses only words.

The advantages and disadvantages of different modes of training are discussed later in this section.

As for question 4 about the attitudes of older workers towards training, recent surveys indicate that older persons are developing more positive attitudes toward training. A Louis Harris survey found that the number of people age 40+ seeking to learn specific job skills doubled between 1974 and 1981, and that 56 percent of respondents between the ages of 55 and 64 were taking or had recently completed educational courses to acquire marketable job skills (Louis Harris and Associates, 1982). Even with these positive changes, it is still

beneficial to program participants to provide motivational training before beginning a training course or job search.

As for question 5 concerning employer attitudes about hiring older trainees, researchers at the University of Michigan's Institute of Gerontology have found that the anticipated future worklife of an employee between 50 and 60 years old can exceed the expected life of a new technology for which the worker could be trained (Root and Zarrugh, 1983). Thus, it can be expected that older workers will remain on the job long enough to justify the cost of the training and to make adequate use of the new skills they learned. For these reasons, program operators may want to encourage employers to expand training and employment opportunities for older workers.

Basic Types of Training

There are three basic types of training: on-the-job training (OJT), classroom training, and work experience. In determining the type of training appropriate for older workers, program operators should take into account the background of the individuals, the subject matter to be learned, cost limitations, and time constraints. This section discusses each method of training in general. The next section presents some examples of successful training for older workers.

On-the-Job Training. On-the-job training provides specific occupational skill training in an actual job setting. The advantages of on-the-job training are these:

- The older worker will receive a wage while being trained.
- The period of training may be shorter, and thus less costly, than for some other training.
- The training is highly job-related.
- The training does not require transfer of skills from classroom to work.

On-the-job training may also have some problems:

- OJT requires that an employer be willing to invest the time in training an older worker and work with the program operator on administrative requirements (paperwork, meetings, etc.).
- Some older workers may need more support than the employer is prepared to offer in a new learning situation.
- Success of OJT may depend on the supervisor's ability as a trainer for older workers.
- The older person with less job experience may need OJT the most, but because private employers often prefer job-ready workers, the more experienced persons tend to be selected for OJT.

- o Some employers are reluctant to enter into OJT contract, because they want to avoid red tape. They may also have preconceptions about poorly-managed Federally funded programs, rather than an unwillingness to hire older workers.
- o Some employers fear being audited if they accept OJT contracts.
- o Some employers are unwilling to hire an older worker without first "testing" the person on the job.
- o Some employers (especially small businesses) are unwilling to wait two weeks or longer for approval of OJT contracts.
- o Some employers prefer direct hires without OJT strings attached.

Recent Program Experience with OJT for Older Workers

The San Diego Older Worker Demonstration Project funded under CETA had planned to enroll 26 of the program's 105 older participants in OJT. They actually enrolled 32 participants, which they attributed to careful screening at intake to match participants with OJT opportunities, and special emphasis on referring only those participants who were most likely to succeed on the job.

Initially, this project planned to include performance contracting (reimbursement hinged on 30-day retention of the older worker after completion of training) for OJT contracts with selected firms, participant use of employer vouchers for OJT to facilitate self-marketing, and the promotion of part-time OJT contracts (at least 20 hours per week) used with job sharing or other employment options.

In the San Diego project, most OJT contracts were negotiated with small businesses. The project reported that no OJT performance contracts were signed, as employers were unwilling to wait for reimbursement or to sign a performance-based contract. The project staff found that providing participants with employer vouchers was successful when combined with a marketing campaign and with assistance

from job developers. Generally, the participants followed up on leads initiated by the job developers. The voucher contained the following information: occupation, length of training needed, and amount of reimbursement due to the employer who would provide the training. All participants were given instructions on the use of the voucher before they visited employers (Dept. of Labor Assessment Report, 1983).

Successful OJT placements may depend on both the assessment of the abilities of the older worker and an accurate match to a job as well as marketing OJT successfully to the employer community. Chapter Two discusses marketing older workers to employers.

One advantage of using OJT contracts as a training opportunity for older workers is that Section 629.38(e)(1) of the Department of Labor regulations specifically includes the cost of developing OJT as a part of the training cost category. This may help program operators to lower administrative costs.

Classroom Training. Classroom training may provide training in occupational skills or basic education in an institutional setting. The advantages of classroom training are these:

- Classes can be individualized to the participants' needs.
- Curricula can be developed with input from employers and adult educators.
- Employers can visit classes to see what is being taught and how it is being taught.
- Training a group together in a class can be cost-effective.

Some problems associated with classroom training are these:

- Classroom training will not be useful unless the material taught is directly related to requirements of a job.
- The trainer must have expertise in the subject matter and in adult learning techniques; in some places, it may be difficult to find such trainers.
- Older workers are more likely than other people to require academic counseling, such as help in developing study habits and tutoring for specific difficulties.
- If training does not provide the older workers with a knowledge of the real work environment, they may have difficulty going from the classroom to the job. Older persons should be prepared for this transition.
- Some older workers may not be able to pass basic aptitude tests required for class enrollment. The lack of these basic skills may prevent them from upgrading their occupational skills, if they do not have the opportunity to improve their reading and writing ability. The failure of the older worker to pass a test may be due to the lack of familiarity with aptitude tests or test taking in general. Standardized testing did not come into wide-scale usage until the 1950's, years after the education of most older persons was completed.

- o Older workers may have to overcome their fear of reentering the classroom so intensive counseling may be required.

▲ Researchers and practitioners suggest the following three points as keys to successful instructional programs for older persons: (1) instruction that provides practical "hands on" experience is preferred over passive forms of learning, (2) learning among older persons is best accommodated by self-paced and individualized instruction; and (3) intensive, short-term training that allows participants to move quickly towards their employment objectives is preferred to longer-term instructional programs (AARP Institute of Lifetime Learning, 1984).

Relevance of the subject matter to the specific work tasks which will be necessary for the trainee to master are more important for the older person than theory and general background information.

Recent Program Experience with Classroom Training

The Broward County, Florida Senior Jobs Program emphasized upgrading skills or teaching new ones in classroom training for older workers. Participants were trained in one of three areas: nursing assistant, dietetic assistant, or auto maintenance/mechanic.

Problems were encountered in the classroom when older workers felt intimidated by the classroom setting and when instructors could not adapt to a pace (especially in the beginning) more suitable to the older learner. They found that orientation for the older workers and instructors was helpful in alleviating this situation. (The Broward County Project is discussed in some detail under marketing in chapter two.)

The San Diego Demonstration Older Worker Project used the individual referral system whereby participants were training in fourteen different fields by 12 educational institutions. They tried

to place at least two older workers together in a class with younger people. They also provided basic educational instruction for those older participants who required remedial work. This project reported that the individual referral system provided greater flexibility and more vocational choices for the participants. The San Diego project reported a 71 percent placement rate for those participants receiving classroom training with an average wage rate of $5.42 per hour. The placement rate and the average wage rate obtained was much higher than anticipated (U.S. Dept. of Labor Report, 1983).

▲ Whether an older worker is placed in a class with other older persons or in an intergenerational class, several basic ingredients are needed to make this a successful experience:

1. Orientation preparing the older worker for the classroom experience;
2. Remedial work in basic skills (reading, writing, and computational skills) if the older worker is deficient in any area;
3. Accurate assessment and direction in vocational choices;
4. Support of others during the training period; and
5. Availability of academic counseling, if needed, during the training period.

(More discussion on training can be found in Part Three on Program Operation under the section entitled, "Training".)

Customized Training. Customized training is defined in Section 204(28) of JTPA as "... training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of that training."

The advantage of developing customized training is that the cost of the development of the training is **not** counted as part of the cost of administration (Section 108(a) of JTPA). The Department of Labor regulations for JTPA do not expand on these points so program operators may wish to contact State officials for further clarification of the accounting of funds used in the development of customized training.

Customized training could be used when there is a group of small businesses that need individuals with similiar skills such as in data processing, in food service, and home health care. The key issue in customized training is that the program **must** have a commitment from the employer involved to hire the trainee(s) **before** training begins.

Work Experience. Work experience is an allowable service to adults under Section 204(15) of JTPA. However, JTPA has established certain limitations on costs which must be considered when planning work experience for program participants. Not more than 30 percent of JTPA can be expended for administrative costs and program support. Costs for program support include:

- o Supportive services for program participants;
- o Needs-based payments;
- o 50 percent of work experience program expenditures if the program meets the prescribed requirements;
- o 100 percent of work experience program expenditures if the program does not meet the requirements.

Work Experience Program Requirements. The expenditure requirements for work experience are found in Section 108(B)(3) of JTPA and are as follows:

1. The work experience is to be no longer than 6 months and is to be combined with a classroom or other training program;
2. Participants may not participate in a subsequent work experience program;
3. The classroom or other training component must be specified in a preemployment contract or must meet established academic standards;
4. Wages paid in the work experience program do not exceed the prevailing entry-level wage for the same occupation in the same labor-market areas.

As mentioned earlier, older women with little or no prior employment experience could benefit from a combination of a work experience program and occupational skills training in a classroom. The work experience should be planned to enhance skills for the participant in the selected occupational field.

The problem for JTPA program operators is one of program resources, since the cost restrictions limit the number of program participants that could be served by a work experience program.

Examples of Successful Training for Older Workers

Training of older workers has been successfully carried out in a number of fields. This section discusses examples in health care, data processing, the hotel industry, education, and other fields.

Health Care. Green Thumb, one of the eight national sponsors of the SCSEP, developed training for jobs in the health care industry for Section 502 experimental projects under title V of the Older Americans Act. This project was conducted in three States: California, Oklahoma, and Tennessee. In Oklahoma, 73 participants were enrolled in a nurse's aide training program developed in conjunction with the State Nursing Home Association and a voc-tech school. Green Thumb contacted the nursing home association, solicited its support, and then held a meeting with the association and the voc-tech school to develop a curriculum. Sixty hours of classroom training were conducted at several voc-tech locations, and 60 hours of work experience were arranged at several nursing homes. The Employment Service actively participated in local promotion and recruitment for this project. The placement rate for the Oklahoma project was 67 percent. (**NOTE:** This type of work experience is permitted only under these special title V demonstration projects.)

In California, a registered nurse and a home economist provided 40 hours of classroom training on the care of the homebound, frail elderly, and handicapped, injured, or ill patients. The curriculum was designed with the assistance of local health care providers. A "mature home health provider service," which will match the aides with private individuals who need the services, was established in cooperation with a local senior center. In the California project, 82 percent of the

participants were placed, most of them in the homes of elderly persons who required regular health care.

In Tennessee, Green Thumb enrolled 65 participants in a "nursing assistant" training program taught by a group of health care consultants who also operate a nursing home. In conjunction with a local area agency on aging, local nursing home and health care providers were invited to a meeting to discuss the industry's personnel needs and demands. A curriculum of 120 hours of classroom training was designed.

The education attainment of successful trainees from this project ranged from the second grade to two years of college, and their ages ranged from 55 to 78. The project staff found that the quality of the teacher is a key determinant of success. The teacher must be able to work with a group of trainees with a wide variety of skills, and who may need some extra assistance with the technical aspects of the training. This project learned that older workers in the training come to the program with an understanding of the special needs of the sick and the elderly, and with interpersonal skills which are valuable in the nursing field.

The project in Tennessee had a placement rate of 79 percent. Most of the older workers completing the training were placed in nursing care facilities (Department of Labor Report, 1983).

Arizona used the Governor's discretionary funds under CETA for a grant to the University of Arizona's Division of Continuing Education in Tucson to train unemployed older workers to maintain medical records (Gollub, 1983).

Hartford, Connecticut, used SCSEP funds to counsel and train for home care. The 13-week program placed a number of participants in jobs in local hospitals, nursing homes, and home health programs (Gollub,

1983).

Baltimore's Waxler Center for senior citizens used SCSEP Section 502 funds to train home health aides to work under the supervision of the Visiting Nurses Association (Gollub, 1983).

Data Processing. A local area agency on aging in Connecticut worked with a local community college and Travelers Insurance to train older persons in data entry techniques and then placed them in local firms. This training was funded by Travelers Insurance (Gollub, 1983).

In New York, a local aging agency developed job banks and worked with the local PIC to train older workers to be word processors in their homes.

The State Division of Aging in Missouri developed a 10-week training course for persons age 55+ in the use of microcomputers under the experimental projects section of title V of the Older American Act. The course consisted of 9 hours per week of training in spreadsheet, word processing, data base management, and general ledger skills. A nationally known computer producer provided the computer equipment for use during the training. Of the 150 persons who enrolled, 101 completed training and 45 were employed within 10 days after completion of the training. Job clubs were formed to help other trainees find employment; and follow-up is now being done (Department of Labor Report, 1983).

Hotel Industry. The Delaware Division of Aging is running an experimental employment project under title V, Section 502, which combines classroom training with private-sector work experience and is designed to prepare older job seekers for occupations in the hotel and restaurant industry. The academic coursework is conducted by the Widener University School of Hotel and Restaurant Management. Trainees work as interns in a specific area of hotel management and are

supervised by professional staff of the Sheraton-Brandywine Inn, located on the Delaware Campus of Widener University.

Paralegal Work. Several SCSEP national sponsors have provided paralegal training to program participants in conjunction with local community colleges.

Child Care. An Area Agency on Aging in San Bernardino, California, trains older adults to provide child care for children under 3 years of age where there is a shortage of providers (Gollub, 1983).

Public Administration. In Montana, CETA funds were used to train 10 persons as older worker job facilitators. These older workers were placed in Employment Service offices throughout the State (Gollub, 1983).

Photography. The U.S. Forest Service is providing training to low-income older persons in photography, cartography, and photogrammetry. Photogrammetry is the making of reliable measurements by the use of aerial photographs in surveying and mapmaking.

Housing Management. The National Caucus and Center on Black Aged is providing congregate housing management training for persons age 55+. A six-month training period will prepare the older participants for full-time placement in positions such as assistant housing manager and management aide in congregate housing facilities. Training consists of a combination of classroom training and on-the-job training. A local Employers Advisory Committee was used to finalize the curriculum design. After six months, participants will be ready to: (1) pass HUD-mandated certification exams, (2) receive HUD certified Housing Manager designation, and (3) assume managerial positions.

Summary

The type and amount of training provided to older workers under JTPA 3 percent programs will depend on three factors:

- o The participant's skills and abilities,
- o The growth industries in the local labor market,
- o JTPA funding and cost limitations.

There are advantages and disadvantages for older workers associated with each type of training discussed in Step 3. Program administrators and staff will need to evaluate the three factors mentioned above to develop a successful program design.

Step 4. Determine Appropriate Strategies for Placement of Older Workers in the Local Job Market.

The following information describes different strategies for use by program operators to increase the likelihood of placing older workers in unsubsidized employment. It is difficult to say if one particular technique will work better for a program operator than another.

▲ Practitioners who have worked on older worker issues have found that it is essential to understand the local context in which they are working in order to determine the most appropriate strategies to use. Some questions that program administrators and planners need to answer before proceeding are:

- What are the current attitudes towards older workers among employers? Among other workers and labor groups? In the area at large?
- How do older workers fit into the current labor market? Are they seen as competing with younger workers for scarce jobs?
- What has been the experience of other organizations or agencies promoting increased employment for older persons in the area?

Once a sense of the area's environment has been gained, the determination of appropriate strategies can proceed. It has been said that the development of an older worker employment strategy is as much art as science (Gollub, 1983).

This section contains information on providing job search assistance to older workers such as job search training, job fairs, and job banks to help older workers find private-sector jobs.

Job Search Assistance Programs

The idea of job search groups is not new; some forms of it have been around for more than 30 years. But this method has been used most often with younger groups of people, and less is known about how this group process works for older persons.

In reviewing job search assistance programs operated in Washington State under various programs, CETA practitioners found that younger (under age 18) and older (age 55+) workers were the people who were least successful in finding unsubsidized employment. Not only did older workers have outdated skills, reentry problems and age-related barriers, but also they were less able than younger people to cope with the stresses involved in a thorough job search process.

Older worker job search groups had a placement rate of 29 percent, while other groups placed between 39 and 87 percent. Because of the low placement rate, the costs were higher for the youth and older-worker groups than for groups of individuals ages 19 through 54 (Gartner, 1983). This experience should not necessarily discourage programs from using the job search groups as a method of placing older workers.

▲ Programs may need to modify some of the basic components of the process to meet the needs of older workers and to adjust to local circumstances (job market, rural, or urban problems). In establishing a job search group, program operators should first consider carefully the characteristics required of the leader and then the characteristics of participants.

Characteristics of the Job Search Group Leader. Whether a staff member or a contractor is used to lead a job search group, the person needs this knowledge and these skills:

- o Knowledge of labor market problems faced by older workers as a group.
- o Ability to facilitate mutual encouragement among older adults so they can deal with discouragement and rejection.
- o Ability to work closely with a group for a continuous period of time. Trainer "burn-out" can be a problem because this position requires a great deal of energy and enthusiasm.
- o Knowledge of job structure in the local labor market and a realistic approach in directing older workers.
- o Ability to work with a group of older individuals who have different needs.
- o Ability to adjust to the different problems presented by rural and urban areas and knowledge of resources in these areas.
- o Understanding of older workers' abilities and skill in handling sensitivities about aging.

Who Should Participate in Job Search Groups?

The ideal candidates for job search groups are people who are job ready and are eager to find unsubsidized employment. Older workers who have completed skills training and are ready to find work, or those who have marketable skills but have been unable to find work on their own, should be considered for a job search group. Job search groups have ranged in size from 5 to 20 participants, with 12 to 15 participants considered effective for older workers (Redmond, 1981). Of course, group size will depend upon resources, the training facility, and the number of participants in the 3 Percent program.

Some problems associated with job search groups are these:

- o Older workers have been found to lack confidence in their ability to sell themselves to an employer. "I'm too old. No employer would be interested in me."
- o Some older people tend to find difficulty adjusting to changes

in the labor market; they insist on doing things the way they used to be done.

- o People may become dependent on their peers or the trainer and fail to develop their own initiative.
- o Homogeneous groups tend to support dependency.
- o People with pessimistic attitudes tend to dampen the group spirit.

Some positive characteristics older workers have shown in job search training and peer support groups are:

- o A strong desire to be productive and utilize their skills;
- o An eagerness to help their peers succeed;
- o A willingness to improve their job-seeking skills;
- o Careful attention to details;
- o A willingness to spend extra time on homework assignments;
- o Reliability and dependability; and
- o A strong desire to learn.

▲ **Other Considerations in Organizing Job Search Groups.** JTPA program operators should consider the following factors in organizing job search groups:

- o Group size
- o Group composition
- o Location of sessions
- o Scheduling
- o Components to be taught
- o Methods to handle individual counseling
- o Follow-up procedures

JTPA program operators should plan to cover these topics in job search groups:

- o Determining skills needed for the job(s)
- o Assessing one's own skills
- o Writing resumes
- o Filling out job applications
- o Contacting employers directly
- o Finding the hidden job market
- o Networking
- o Using job referrals from peers and staff
- o Self-marketing techniques
- o Interviewing techniques
- o Managing stress
- o Organizing the job search

From the beginning, group leaders should inform older workers how the job search group will help them and what its limits are. The emphasis must be on helping oneself and on encouraging and assisting other members of the group when possible. Periodic self-evaluations, along with peer and leader evaluations, have been reported to be useful with older workers (Redmond, 1981).

The leaders need to balance encouraging the group with keeping expectations realistic. For example, some older workers have been reported to have turned down jobs because they thought the training they had received qualified them for a higher-level position with more pay than it actually did. Thus an employment opportunity was lost.

Staff who have worked with job search groups of older workers have stressed the need for leaders to adapt their approach to older workers' experiences and maturity. For example, whereas groups for youth emphasize proper dress, hygiene, and promptness for job interviews, older workers find such an emphasis offensive because they already know these basic requirements for interviewing. Group leaders must make sure that all material used in job search groups is relevant to the

particular group of older workers with whom they are meeting. Some of the material may be used in individual counseling sessions instead of with a group.

▲ For more detailed information, refer to a recent publication, "Matur[illegible]Older Job Seeker's Guide" published by the National Council on Aging. The address for the National Council on Aging can be found in Appendix C.

Some examples of job search activities follow:

- In Oregon, the Senior Services Division of the Department of Aging is conducting a demonstration project under Section 502 of title V of the Older Americans Act to provide the necessary assistance to participants to enable them to get jobs in the private sector. Participants receive extensive assessment, counseling, motivation, and job search instruction during an intensive 4-week course, as well as subsequent peer group support and assistance in self-directed job search.

- In the California State SCSEP program, older adults are encouraged to participate in "training the trainer" workshops on job search techniques (Gollub, 1983).

- Missouri allocates SCSEP funds to its area agencies on aging, which use the funds for traditional subsidized employment as well as for job clubs and job search assistance activities (Gollub, 1983).

- The CETA Senior Jobs project in Broward County, Florida, used one-on-one counseling to identify problems with skills or work habits that were a handicap for the older participant in job seeking or job retention. During group sessions, the Senior Jobs project staff taught the older participants how to

overcome an employer's belief (and their own) that their age was a barrier to employment. The Senior Jobs project achieved an over-all placement rate of 71 percent which was attributed to the individual counseling and the renewed confidence of the older workers who again believed they had something to contribute to an employer.

Job Banks

Job development and referrals may become important parts of program strategies for placement. One way to handle job referrals is by establishing a job bank. Research has shown that job referrals can be most helpful to older workers, especially older women.

A review of the services provided by local Employment Service (ES) offices in a study for the Commission found that fewer than 5 percent of older workers received counseling, were tested, or were referred to support services. Virtually none of the local ES offices was found to be referring older workers to job training programs (Johnson et al., 1983).

The service most frequently provided to older workers was job referrals (17 percent of the men and 22 percent of the women received at least one job referral during a 6-month period). However, older job hunters were less likely to receive referrals to jobs than younger job seekers. These differences could not be attributed to personal characteristics (e.g., education, attitude, motivation) of members in the two groups (Johnson et al., 1983).

A significant increase in earnings was found for women and a small increase for men for older workers who did receive ES job referrals. The authors of the study deduced that the large gains for women reflected their increased probability of finding work (Johnson et al., 1983).

Women who received a referral found a job 7 weeks sooner, on the average, than those who did not receive a referral. Older women who received a referral were employed 52 percent of the period, compared to only 26 percent for older women with comparable characteristics who did not receive a referral.

If these findings hold true, program operators will want to examine different ways of providing older workers with job referrals. For example, Missouri's Mideast Area Agency on Aging has developed good relations with the business community. Firms such as McDonnell Douglas, Monsanto, and the May Company have been working closely with this agency to increase employment opportunities for older workers (Gollub, 1983).

Senior Enterprises, Inc., in Indiana matches older workers and private-sector firms. This service organization, funded by the United Way and private donations, placed 368 persons in jobs in 1982, mostly in small businesses. Service clubs such as Kiwanis, Rotary Club, and Society of Retired Executives are contacted to spread the word about older workers (Gollub, 1983).

One way to provide older workers with job referrals is to establish a job bank. Some programs placing older workers have found that a direct mailings to community employers announcing the job bank is a good way to begin. Other sponsors have used job fairs (discussed later) to inform employers of this available service. Other methods of advertising include newspapers, public service announcements, and notices in trade publications, newsletters, and so on. These announcements should emphasis that a service is being provided to employers--the recruitment, screening, and referral of mature, job-ready employees.

▲ To establish a job bank, program operators can take the following steps:

- o Develop working relationships with employers to receive job listings.
- o Develop a systematic approach for keeping information on job listings.
- o Study local worker demand--business and industry expansions and

contractions, and the resultant occupational changes.

- o Determine appropriate methods for assessing older workers' skills.
- o Match employers and older workers on a continuous basis.
- o Follow-up to determine results of placement for the older worker and employer.

Some examples of these activities follow

Pennsylvania's Project POWER (Promoting Older Worker Equal Rights) used the Governor's CETA discretionary funds to hire employment specialists to act as job brokers in area agencies on aging, setting up job and skill banks and intake procedures, and matching older workers with the local labor market. In nine months, 501 placements were made. In addition, older workers were being registered at the State Employment Service offices to increase the quality of statistics on older workers' needs (Gollub, 1983).

The area agency on aging in Nassau County, New York, developed its own job bank with job development outreach to local firms (Gollub, 1983).

Ohio's Commission on Aging is developing job banks throughout the state, run by SCSEP enrollees with administrative experience. Participants are reached through public service announcements (Gollub, 1983).

Working with the Employment Service. The Employment Service (called Job Service in some States) will more than likely have the largest source of job listings in most areas. Coordination between JTPA programs and the Employment Service (ES) is directed by the legislation to prevent unnecessary duplication of services at the local level. JTPA 3 percent programs are encouraged to contact ES to work out methods for referrals of older persons to the program and for

sharing of job information.

An example of this type of coordination is in Florida where the Bureau of Employment Services is establishing a statewide information bank, which will list available older workers with their skills. Each local Aging and Adult Services Office in the State will receive a computer printout listing all persons age 55 and older who are registered (Gollub, 1983).

▲ Job Fairs

Job fairs can be an excellent means of publicizing the employment needs of older workers and the skills that older workers have to offer employers. Job fairs may be sponsored jointly by the JTPA 3 Percent program, employers, and the media. Such fairs have proved to be a source of immediate placements and a means of building long-term relationships with private sector employers (Gollub, 1983). Older workers like job fairs because they offer a neutral turf on which to meet employers and hence seem less threatening than private interviews.

Planning and organizing job fairs may require considerable JTPA staff time. Staff must prepare agendas and engage speakers if seminars are being run concurrently. Staff also must investigate employer vacancies and prepare older workers for interviews. The facility must be carefully chosen to provide adequate space for interviewing and accessibility for handicapped persons.

In Philadelphia, the Mayor's Commission on Aging has developed a series of job fairs and media promotion of older workers. The job fairs began in 1979 with 75 firms cooperating. The most recent job fair encompassed four counties, included 80 firms, was attended by 2,500 people, and resulted in 300 placements of older workers. The mayor's office also publishes a letter to industry profiling workers on a waiting list. The first newsletter, which listed 3,000 names, resulted in 20 immediate placements. As part of its community service responsibility, the local NBC affiliate cosponsors a weekly television program called "Senior Job Line," which actively markets older workers (Gollub, 1983).

▲ Using Older Adults as Program Staff and Volunteers

These JTPA training programs will be expected to set an example to the community and employers on using the skills and abilities of older persons. Any recruitment for new staff for the 3 Percent Set-Aside Programs, therefore, should be widely advertised so that older persons will have the opportunity to apply for any position for which they are qualified.

One recent study of voluntarism found that 20 percent of older adults donate time for volunteer work (Jusenius, 1983). When programs do not have funding for additional staff, services can be expanded by using older persons as volunteers. Some activities that older volunteers would be very effective in are:

- Job development where the older volunteer may have long standing contacts with private employers.
- Developing and distributing information to program participants and potential applicants about the program or about job opportunities in the local area.
- Planning and coordination of job fairs and setting up employer seminars.
- Establishing a system for tracking job listings and matching of older workers' skills.
- Counseling and support activities.

PROGRAM PLANNING AND DEVELOPMENT CHECKLIST FOR TRAINING OLDER WORKERS

▲ The following is a checklist JTPA practitioners can use in the planning and development of training programs for older workers.

1. Analyzing the employment and training needs of the eligible older population.

   - o How large is the eligible population?
   - o What are the characteristics (age, sex, minority status, education) of the eligible population?
   - o What is the employment status of this group (employed, part-time workers, seeking employment, out of the workforce)?

2. Assessing the barriers to employment older workers face.

   - o What is the image of older workers in the community?
   - o What are the barriers to employment faced by older women reentering the labor market?
   - o What are the barriers to employment faced by older minority persons?
   - o What resources are available in the community to help older persons with health problems?
   - o What barriers do older workers have to face in finding part-time employment?

3. Determine training procedures.

   - o What types of training are needed for expected new job openings?
   - o What would be the best methods to use for the types of training needed for older workers?
   - o Who are the employers to contact for involvement in the training?

- o What institution or facility (vocational education schools, community colleges, adult education centers, public school system, other training contractors) would provide the most cost-effective training of the type needed?
- o What specific skills and knowledge must be learned or relearned by the older worker?
- o How will the training methods be evaluated for effectiveness?
- o Will the proposed training meet employers' needs?

4. Determining placement avenues.

- o Are there mechanisms for helping older workers find jobs already available in the area? If so, can the program be linked to these services?
- o Has a system been developed with the local Employment Service for the referral of older participants to appropriate job openings?
- o Has customized training been considered for increasing placements?
- o Should job banks be considered?
- o Have employers been contacted for input on methods of expanding employment opportunities for older workers?
- o Is there an interest in the business community (large and small firms) for OJT contracts?
- o Should job assistance groups be organized?
- o Have job fairs been tried in the area? If so, how successful were they?

Summary

Information in this chapter was provided on older workers for use by JTPA practitioners in program planning and development. Practitioners at the local level can examine the successes and problems experienced in training older workers by program operators under CETA, the SCSEP, and others, as well as research findings on the participation of older workers in these programs.

This chapter also discussed the needs of various groups of older workers and the implications of these needs for program design. It may be necessary to adapt traditional training and placement methods to the needs of older workers. This chapter provided some suggestions on how these methods could be made more appropriate for the older worker.

Chapter 2
PROGRAM PLANNING AND EMPLOYERS

This chapter provides information on the private sector which is intended to help operators design programs for older workers and build working relationships with private-sector employers. Much of the material in this section comes from research, which included interviews with employers about hiring older workers. The material is organized into four steps, to parallel the organization in Chapter 1. Whereas the focus in Chapter 1 was on older workers themselves, the focus here is on their potential employers. The four steps JTPA program operators may consider in working with private-sector employers are:

Step 1:

- Determine the workforce needs of employers.

Step 2:

- Develop an understanding of the barriers to hiring older workers.

Step 3:

- Review the techniques employers can use to increase employment opportunities for older workers.

Step 4:

- Determine appropriate strategies for marketing older workers to private-sector employers.

This chapter cannot tell program operators and staff exactly what to do and when because what may work well in one section of the country may not work well in other places. Local operators are the best judges of the procedures and program prototypes that have the best prospects for success in their areas. Suggestions are presented here for using the information gathered from research, but it is left to the discretion of the operators to determine what is applicable to their

particular set of circumstances (e.g., guidelines set by the State, geographic location, and economic conditions).

Step 1. Determine the Workforce Needs of Employers.

The workforce needs of employers have been changing as technology has advanced and service occupations have mushroomed. This section looks at where the jobs are now and what the trends mean for employment of older workers.

Ninety percent of all new jobs added to the economy between 1969 and 1976 were in service occupations. By 1990, it is estimated that 72 percent of the labor force (more than 89 million workers) will be employed in service-producing industries.

According to the Commission's 8th Annual Report: The Work Revolution,

> "Social and demographic changes are leading factors in the rapid growth of service occupations. As more women have entered the workplace and as family incomes in two-wage-earner families have risen, there has been more use of commercial cleaning establishments, restaurants, and other personal and child care providers. The need for health and medical care services are also likely to increase as the general population ages. Other contributing growth factors include the expansion of cities and suburbs,...the growth of banking, credit, and real estate industries in response to an expanding population, and...the burgeoning demand for the production and manipulation of data that has accompanied the development of computers and telecommunications devices."

Computer-related jobs began to increase rapidly in the 1970s, and that growth is expected to continue through the 1980s. Increased

automation is profoundly affecting the workforce; jobs are decreasing in automated manufacturing plants and in industries that are not automating fast enough and thus are losing their competitive edge to other companies or to foreign imports. In the recent recession, thousands of jobs were lost in "smokestack industries" such as iron, rubber, steel, automobile manufacturing, and other basic industries.

The growth of the service sector, therefore, will provide new jobs in the future; but many of these jobs are likely to pay less than manufacturing work has in the past.

Recent Trends. The U.S. economy began to turn up during the first half of 1983 with an increase of 1.1 million jobs in the nonfarm sector. The service-producing sector accounted for 649,000 of these new jobs; most of them in finance, insurance, real estate, services, and retail trade. It should be noted that two industries in this sector actually declined during this period: transportation and public utilities, and government (Federal, State, and local). In past recoveries, employment in the government sector has increased but this has not been the case in this recovery, particularly with State and local government (Bower, 1983).

The goods-producing sector accounted for 450,000 new jobs in the first six months of 1983. Increases were noted in construction, lumber and wood products, electrical equipment, and transportation equipment, especially automobiles (Bower, Division of Employment and Unemployment Analysis, Bureau of Labor Statistics, 1983).

In a study of employment trends between 1978 and 1930, the Brookings Institution found that 55 percent of the net growth in employment was in firms with fewer than 20 employees. About 78 percent of the net growth during that period was firms with fewer than 100 workers. Firms less than 2 years old accounted for a much greater share of the net employment growth than did older firms.

What the Trends Mean for Older Workers. Older workers tend to be employed in the same kinds of jobs as other workers. Refer to Table 4 in Appendix E which illustrates the distribution of employment by industry of all workers and workers age 55+.

Approximately one-fourth of the workers who are self-employed are age 55+. This may be due to the fact that self-employed persons can control the number of hours they work and their work schedules. Occupations that have relatively high flexibility in hours worked, such as service and sales, are projected to grow more rapidly and may offer both full and part-time job opportunities. Unfortunately, many of these jobs are likely to have lower pay and lower status than jobs in other areas (Fullerton, 1983).

One analyst (Fullerton, 1983) decided that the shift in industries and occupations did not appear to have a detrimental effect on older workers. However, some older workers who are displaced from high-paying jobs in the goods-producing sector will find it very difficult to find comparable jobs in the service area.

Questions for Determining the Workforce Needs

JTPA administrators and planners may want to consider the following questions that can be used to assess the local labor market for older workers:

1. What are the occupations and industry groups that currently employ older workers?
2. What percentage of the jobs in the community are in the goods-producing sector? Service-producing sector?
3. What local trends in jobs are evident over the last five years?
4. What sectors of the local economy are projected to decline or

grow?

5. In the area of growth, what types of new employment opportunities are expected?
6. What are the projected critical skill shortages?
7. Which of the expected new job openings would be appropriate for older workers?
8. What local firms have a record of hiring older workers?
9. What are the short-term projections for full-time job openings? Part-time openings?

In order to answer these types of questions, JTPA practitioners will need to obtain as much accurate and current labor-market information as possible.

Obtaining Labor-Market Information for Program Planning

In the past some local program administrators and planners have had difficulty in obtaining information on local trends and projections of local employment growth. Under Section 461(a) of JTPA, the Secretary of Labor is required to set aside funds to maintain a comprehensive system of labor-market information on a national, regional, State, local, or other appropriate basis. Funds are allotted to all States to develop State and local information useful for planning and operating the JTPA program.

The States are responsible for seeing that local planning information is prepared for each service delivery area (SDA). Here are some examples prepared by the Department of Labor of the types of local planning information that can be provided:

- Annual demographic information for JTPA programs: data on State and area employment, unemployment, occupational supply and demand, critical skill shortages, and wages, as well as the number and characteristics of the population and labor force.
- Annual job development plan for the Employment Service: local labor-market data on employment and employment growth by industry and current ES job openings and placement.
- Placement assistance products: lists of job openings, occupational descriptions, employer requirements, commuting patterns, and job search assistance.
- Short-term and long-term supply-demand analyses: as data become available, trends and projections in employment and job openings.
- Newsletters on monthly or quarterly developments in area employment: review of significant changes in employment and unemployment conditions, and discussion of other events that may affect labor-market conditions in the area.
- Technical assistance guides for local planners: curriculum

design for JTPA planners, ES planners, and State labor-market analysts.

- o A directory of products: a catalog of local planning information materials and services.

Note: These specific types of information are **not** required by the Department of Labor so the available information may vary considerably from State to State (Department of Labor Report, 1983).

Another source of labor-market information is the State Occupational Information Coordinating Committee (SOICC), which by law includes representatives of the State Vocational Education Agency, the Department of Labor, Vocational Rehabilitation, and the State Job Training Coordinating Council.

Several types of occupational information may be available from the SOICC: (1) annual statewide projections of labor supply and demand, wages, educational requirements, and the number of workers to be trained in existing programs, and (2) lists of programs or institutions that provide training for the various types of employment in the State. (The available information from the SOICC also may vary considerably from State to State.)

▲ Program operators should take the following steps to gather labor-market information in their areas:

- o Seek out the agencies responsible for preparing local labor-market information (usually the Employment Service or the State Occupational Information Coordinating Committee or both).
- o Sponsor joint staff meetings with the responsible agency for exchange of information. Labor-market analysts need to know the data needs of older-worker programs.
- o Contact community colleges in the local area; many regularly collect labor-market information to project the need for

specific types of education and training.

- o Contact all these additional sources of potential information before gathering any information on your own:
  - . Bureau of Labor Statistics
  - . Labor unions
  - . Trade associations (Chamber of Commerce)
  - . Large banks
  - . Public and private universities
  - . State and local economic development agencies
  - . State and local planning agencies.
- o Conduct surveys when information is not available through other labor-market sources (Section 204(9) of JTPA).
- o Remember to break down labor-market information with the specific needs of older workers in mind. Some anticipated job openings--such as jobs requiring primarily physical strength or dexterity--may be inappropriate or undesirable for some older workers.

Summary

Having some knowledge of the existing and predicted local labor market is essential to the planning of any employment progam. All the training in the world will be meaningless unless there is a job to which the participant can apply the training.

Step 2. Develop an Understanding of the Barriers to Hiring Older Workers.

When working with private-sector employers, JTPA practitioners will need to understand some of the barriers to hiring older workers. The main barriers to employers' hiring older workers are acceptance of negative stereotypes (or age bias), retirement pension policy, fringe benefit costs, tax policy, and economic conditions.

Negative Stereotypes. Researchers note that negative stereotypes are generally based on the assumption that older workers suffer from diminished physical and mental capacities (Root and Zarrugh, 1983). There is no question that aging results in physical changes, but because of variations among individuals within age groups, researchers have found it hard to make conclusive statements about the general relationship between age and competence and productivity. With physical changes in aging, chronic illnesses do become more prevalent. But many illnesses can be controlled by medication; as a result, people can continue their daily routines.

In other words, age per se does not make a person unproductive or unable to perform a certain job. Just as is true with people in younger age groups, what individuals can do depends on their skills, abilities, and physical capacities.

Negative stereotypes may also unconsciously influence personnel decisions. A study of executives in a decision-making simulation found that even though they expressed support for age-free policies, many of the executives made negative decisions about training and promotion when older workers were concerned (Root and Zarrugh, 1983).

One author has stated that stereotypes reflect a confusion between age and ill health. Healthy persons change as they age, but most people compensate for these changes. The author (Gollub, 1983) gave

the following examples of how people compensate for physical changes:

- o Changes in vision are compensated for by corrective lenses.
- o Changes in visual processing (when it takes longer to make sense of a complex pattern as, for example, in driving in traffic) are compensated for by taking greater care.
- o Changes in hearing--loss of ability to hear high tones or difficulty in processing several sounds at once--are compensated for by listening more intently.
- o Changes in strength occur because the human body loses muscle mass with age. A weight-lifter cannot lift as much at age 60 as at age 25, but some 60-year-olds can still lift more than many 25-year-olds.

There are some indications that employers no longer readily accept negative stereotypes. A recent survey of executives in major U.S. firms showed these attitudes toward older workers:

- o 80 percent believed their company would have a larger proportion of older workers in the near future.
- o 76 percent would hire workers over age 50.
- o 90 percent believed that older workers would perform as well as younger workers on the job.
- o 86 percent thought older workers were more committed to company objectives than their younger counterparts (Mercer, 1981).

Another researcher (Sheppard, 1983) however, pointed out that "in the 1981 Harris survey nearly 80 percent of the respondents in a position to hire or fire employees agreed with the statement that most employers discriminate against older workers".

Thus, JTPA practitioners should be aware that one of the most difficult tasks in their job of working to bring older workers and employers together is dealing with negative stereotypes that result in

age bias against the older worker.

▲ JTPA practitioners can take these steps:

- o In a marketing campaign, emphasize the positive traits of older workers and their value to employers. For example, managers in corporations that make it a practice to hire older workers stress "their reliability, experience, the pride they take in their work, their devotion to corporate goals, paucity of 'convenient' absences, cost savings and efficiency resulting from low turnover" (Buchmann, 1983).
- o Encourage those employers in the local community who have a record of hiring older workers to tell other employers about their experiences and the economic value of hiring older workers.

Retirement Pension Policy. Eight managers interviewed in a Commission-sponsored study identified the Social Security retirement earnings test as the greatest disincentive to work for Social Security beneficiaries. These managers expressed frustration at the fact that once older persons who were receiving Social Security earned up to the maximum allowed without losing benefits, they usually ceased working, or they would limit their hours upon reemployment so not to exceed the limit (Paul, 1983). This rule is especially restricting to part-time older professionals who earn a high hourly wage. Conversely, the earnings limitation for Social Security may serve to make older workers more willing to work for lower wages.

Another influence on employment opportunities for older workers is the Employee Retirement Income Security Act (ERISA) of 1974. One of the provisions of ERISA is "the 1,000-hour rule" which mandates pension vesting for employees who work 1,000 hours or more yearly. All the retiree labor pools surveyed in one Commission-sponsored research had a 1,000-hour restriction build into their personnel policies to prevent

the company from becoming liable for pension benefits. The managers interviewed indicated that if the 1,000-hour rule were eliminated, their organizations would permit older persons to work more hours (Paul, 1983).

Basically, Social Security earnings limitations and ERISA provisions offer incentives to older workers and to employers to limit work hours. Since it is unlikely for policy changes to occur for either Social Security or ERISA in the near future, it may be practical for JTPA programs to spend time developing part-time options for participants age 62+ who are receiving Social Security retirement benefits.

Part-time placements would not adversely affect the program's performance as generally, the placement rate is based on participants obtaining employment either full or part-time and the average wage obtained at placement. However, as previously mentioned, one study found that generally employers pay less for part-time work because of the increased administrative cost of hiring and training part-time workers. If JTPA programs are screening and training older workers, the costs of hiring for part-time jobs should be less expensive for employers allowing for the possibility of increased wages.

Fringe Benefit Costs. The Age Discrimination in Employment Act (ADEA) provides that older workers must not receive benefits of lower cost than the benefits other workers receive, but the nature of those benefits may be adjusted to reflect cost differences associated with age. In reality, complications may arise from the adjustment of the benefits package to compensate for age-related cost differences. Recent changes in Medicare coverage have further complicated the situation.

Provisions of the 1982 Tax Equity and Fiscal Responsibility Act (TEFRA) shifted medical costs for workers age 65 to 69 from the

Medicare system to employers. Firms with 20 or more employees that offer health insurance to any of their employees are now required to cover workers age 65 through 69. The employer plan also must become the **primary payer** of health costs. Previously, employers could exclude workers over age 65 who were covered by Medicare. If the employer health plan did include workers over age 65, Medicare was still the primary payer.

Twenty-three of twenty-five managers interviewed stated that their organizations expected their company health plan costs to rise as a result of this legislation, which became effective January 1, 1983. The managers generally estimated that the increase in cost would be minimal, however, because the number of employees affected by TEFRA was currently less than 1 percent of their workforces (Paul, 1983).

The Commission sponsored a study to determine the effects of these changes on employer costs and on the employment of older workers. The results were as follows:

- o About 434,000 private-sector workers age 65 through 69 would be affected by these changes.
- o The changes would cost employers almost $500 million.
- o Two-thirds of the older workers affected were previously covered by employer health plans. The additional benefit costs for these workers are estimated at 8 percent of their total compensation costs before the change or approximately $977 per worker.
- o About 148,000 older workers, or one-third of the total affected, were previously excluded by employer plans. The additional health care costs for these individuals is estimated to average $1598 per worker--about 13 percent of their total compensation before the changes were made.
- o These changes may reduce the demand for workers of this age by about 1 percent (about 15,000 men and 5,000 women).

(Anderson, 1983)

The analysis by these authors indicated that these amendments may have significant effects on the health plan costs of some particular firms, but that these changes would probably not significantly affect the overall employment situation of older workers or of other age groups.

Because of the changes in TEFRA legislation, employers may be concerned about the increased fringe benefits costs and thus be reluctant to hire older workers. Practitioners should be aware that small businesses with fewer than 20 employees are **not** affected by this legislative change. For those businesses with 20 or more employees, the total increased costs will depend on the percentage of their workforce who are 65+, whether or not their health plan previously included employees 65+, and any increased administrative costs related to revising health care plans. This legislation is more likely to affect the hiring practices of those companies with 20 to 100 employees. To sell older workers to employers who are concerned about these costs, practitioners will have to stress the areas in which an older worker may reduce costs for the employer to counterbalance any increased fringe benefit costs.

Tax Policy. All managers interviewed expressed the opinion that the government should continue to promote increased employment opportunities for older workers but not through regulatory or tax policy. They commented that the government should be an advocate for older workers by distributing information on research about the capabilities of older workers and about work alternatives.

In regard to tax policy, four of the companies had participated in the Targeted Jobs Tax Credit (TJTC) program, and all reported negative experiences. Twelve of the organizations not using TJTC reported that they would never participate in a tax credit program because the work

involved in using the credits outweighed the benefits gained. Only one manager out of twenty-five stated that he believed his company would be interested in receiving future tax credits for increasing employment opportunities for older workers (Paul, 1983).

Although most of the policies just mentioned are generally made at the Federal level, some State and local governments have also passed regulations regarding mandatory retirement and tax policies. JTPA practitioners need to be aware of the implications of Federal, State, and local policies on the employment prospects of older workers in the geographic area the program is serving. These policies may enter into discussions with employers, so practitioners should know the aspects of the regulations or policy that may reduce or increase the cost of hiring an older worker.

Sometimes, a law may have both effects. For example, the Age Discrimination in Employment Act permits the exclusion of a newly hired worker who is age 60 or over from pension plan participation and the cessation of pension crediting beyond the normal retirement age. These two aspects of the regulations may reduce the costs of employing the older worker, whereas the administrative costs from the adjustment of the benefits package may raise the cost of hiring an older worker.

JTPA practitioners may wish to check with State and local personnel agencies for current State regulations and laws regarding mandatory retirement and age discrimination. For example, in Florida, mandatory retirement has been eliminated by State law in both the public and private sectors, with limited exceptions. The Illinois State law prohibits discrimination but does not address retirement age (Gollub, 1983).

Some sources of research on older workers are: Aging and Work, a journal on age, work and retirement, published quarterly by the National Council on the Aging, Journal of the Gerontological

Society of America, and the Institute of Lifetime Learning of the American Association of Retired Persons (AARP). Addresses for these organizations can be found in Appendices C and D.

Economic Conditions. Researchers at the University of Michigan found that numerous employers who had been offering work alternatives to older workers suspended those options during the recent recession. For example, one company reported termination of job sharing when business dropped off and another stopped using part-time employees during rush periods (Root and Zarrugh, 1983).

JTPA 3 Percent programs will be faced with some harsh economic situations in some local areas. In these cases, establishing linkages with local governments, business groups, and economic development agencies that are trying to bring new business into the area and working to help older workers who have the ability to build their own businesses will be two ways of dealing with the economic situation.

For example, some cities and counties are beginning to negotiate agreements with businesses that link public assistance, such as mortgage revenue bonds, land writedowns, and tax cuts, to agreements by the businesses to hire disadvantaged workers. These agreements have been negotiated in Portland, Oregon; San Francisco; Jamestown, New York; San Antonio; Buffalo; and Boston. The agreements have not focused specifically on older workers, but this may be a possibility in the future (Gollub, 1983).

A recent Commission-sponsored report on JTPA pointed out that coordination with local economic development agencies was emphasized by local programs early in the transition period from CETA to JTPA. Some economic development officials reported that they were only interested in JTPA participants who were job ready and skilled (Walker, 1984).

▲ JTPA 3 Percent Programs can consider the following steps for

working with economic development agencies:

- o Develop customized training for older workers to provide employees with the needed skills for new firms moving into the area.
- o Develop a system for referral of skilled older workers for job openings with new employers in the area.

For those JTPA 3 Percent Programs interested in assisting older workers in starting their own businesses, refer to Entrepreneurship in Vocational Education: A Guide for Program Planning, by the National Center for Research in Vocational Education. The guide is designed to teach youth about operating a small business, but much of the guide is relevant to all age groups or can be modified to apply to older workers.

Classroom training in business management, combined with support and mentoring from a local business owner may be two of the steps needed to get some older workers with the right skills started in a small business. The local office of the Small Business Administration may also be able to assist.

▲ Programs should exercise caution in this area because the Small Business Adminstration asserts that almost half of all small businesses fail within the first two years of operation. There are some key ingredients to success in training persons to operate a business:

- o Enroll participants who already have the vocational skills required to operate a business in their field.
- o Enroll participants who have the leadership characteristics needed to manage a business.
- o Examine training programs in business management in the area (i.e., community colleges, private consulting firms, vocational education institutions) to determine the most appropriate

businesses for older workers.

- o Solicit support from other small business owners.
- o Emphasize the benefits of the program to the community at large and to the business community. Discuss with banks the possibility of loans for older workers in need of capital for startup costs.
- o Track the participants after the training is over to determine if there are other ways the program can assist them in starting or maintaining a successful business (National Alliance of Business PIC Guide No. 2, 1982).

Step 3. Review the Techniques Employers Can Use to Increase Employment Opportunities for Older Workers.

The first subsection here discusses seven employment options private-sector employers can use to increase employment opportunities for older workers. The second subsection points out some factors that influence management's decision to offer work alternatives to older workers, and gives some specific examples of work alternatives and the advantages and disadvantages accompanying them for older workers and employers. Each subsection concludes with an assessment of how JTPA program staff can use the research material on employment options.

A Commission-sponsored study conducted by the Andrus Gerontology Center at the University of Southern California examined work alternatives for older workers in the private sector. The study reviewed how employers developed and administered these employment options as well as how public policy influenced the availability of the options. A survey of the broad types of industries and businesses offering work alternatives to older workers and the broad categories of workers generally offered work alternatives is given in Appendix E.

Seven Employment Options Private-Sector Employers Can Use

This study (Paul, 1983) evaluated seven employment options that have been tailored by employers for the use of older workers:

- Two part-time work schedules:
  1. Job sharing--One full-time job is shared by two workers.
  2. Phased retirement--A part-time work schedule allows a gradual reduction in work hours, generally over a two-year work period. This permits the retirement-age employee to "phase into retirement." It appears to be the fastest growing of the employment options for older workers.

- Two employer hiring strategies for increasing the number of older workers employed in their organizations:

  3. Labor pools--In most cases, employees are asked at the point of retirement if they are interested in working for the company on a part-time basis. Those who are interested form a pool of temporary workers used for professional, technical, and secretarial services.

  4. Targeted job recruitment--A small number of employers are using the media to recruit persons age 55+. Often, radio and TV announcements and billboard advertisements are used to attract older people to apply for full-time and part-time permanent positions.

- Three work alternatives involving changes in the nature of the work being performed:

  5. Job redesign--This is one of the least commonly available options to older workers. It is used to change some of the tasks being performed on a given job for an employee who is having problems dealing with the physical or mental demands of the job.

  6. Job transfer--Job transfer provides older employees with the alternative of transferring from their current position to a less demanding job instead of retiring. Researchers learned that job transfers and redesign cost the most in time, money, and creativity.

  7. Job training and retraining--Training and retraining are generally provided to help workers update their skills or prepare for new careers.

The researchers interviewed 25 employers using these options, including five aircraft and aerospace engineering companies, five high-technology product manufacturers, three banks, three insurance companies, three public education institutions, one municipal government, one publishing company, one fast-food chain, one employment agency, one mail-delivery firm, and one retail-trade organization.

They found that the options are generally offered either as formally structured programs or as personnel practices informally used by managers and supervisors.

Much more publicity has been given in the business community to labor pools and phased retirement than to the other options. Job sharing, retraining, and targeted job recruitment have not been actively promoted in most areas. Job redesign and job transfer usually are handled on an individual basis between employees and supervisors; the business community overall appears to have little information concerning their use (Paul, 1983).

▲ Ways JTPA practitioners can work with private-sector employers to promote work alternatives for older persons and to obtain placements:

- o Hold employer seminars for dissemination of research on work alternatives and discussion of practical ways employers can use the alternatives. For example:
  - . Targeted Job Recruitment-JTPA programs could be a source of job ready and trained older workers for interviewing for job vacancies. There would be no fee to the employer for placement.
  - . Labor Pools-JTPA programs could be a source of temporary workers for employers that have an overflow of work. This could be especially useful to those older workers who need additional income while in training.
  - . Job Sharing-Practitioners could demonstrate how an employer could take one full-time job and develop it so two workers could share the position. JTPA programs with older workers who desire part-time work would be a source for recruitment for these employers. Also, those participants desiring part-time work could receive training on how to effectively and efficiently share a job with another individual.
  - . Job Redesign-This technique can be particularly useful to

older workers with health limitations. Demonstrating to an employer how a job could be redesigned so it is less physically demanding for the worker but still can be done productively could open opportunities for particular older workers. Guidelines for conducting such an analysis are available in the U.S. Department of Labor's Handbook for Analyzing Jobs.

Factors Influencing Management's Decision to Offer Work Alternatives to Older Workers and Some Specific Examples of Alternatives

Researchers found that the reasons employers develop employment options vary with certain characteristics of the firm: the "culture" of the organization, the character of its labor-management relations, the need for the option in the workplace, and the nature of business conditions.

The "culture" of an organization is represented by the image that the employer projects to the community and the environment the company provides for its employees. Most organizations offering employment options for older workers were seen as "employee oriented" or concerned about their employees' satisfaction with their work. Many of these organizations were found to have a group of older managers who encouraged policies that addressed issues related to older employees (Paul, 1983).

Only a few of the organizations surveyed had unionized employees. In those that did, it was learned that the union supported the alternatives being offered to older workers.

Business conditions affect these options in that the need for the particular option in the workplace is determined by the need to meet productivity goals or labor demands. Basically, researchers have found

that management offers employment options to older workers when it is in the organization's best interest to do so. JTPA program operators and older workers should understand that all these options are approaches to meeting the personnel needs of the company. These options represent management tools that offer great flexibility to the organization.

▲ JTPA programs can use this material in the following ways:

- o Discuss the specific benefits for the employers hiring JTPA trained older participants.

  (1) Prescreening of applicants with no placement fee.
  (2) Availability of job-ready participants who were trained at no cost to employers.
  (3) Follow-up assistance from JTPA to ensure a successful transition for the participant to employment.
  (4) Previous attention to any personal problems that might have interfered with job performance (Pritz et al., 1983).

- o Work with unions to gain support for work alternative for older workers.

The following paragraphs give some specific examples of work alternatives (Paul, 1983) and outline the advantages and disadvantages of each option to older workers and to employers.

Job Sharing. Because of declining enrollment, one public school district was faced with the prospect of having to layoff teachers. Management did not want to layoff "the last hired" who represented the youngest teachers and most of the minority teachers, so a job sharing program was instituted for teachers age 55+. Teachers who were willing to work half-time by sharing their jobs with another staff member were offered full fringe benefits with a 50 percent reduction in pay (pension continued to accrue at the full-time wage rate).

The benefits for management were that layoffs were avoided, teacher morale was maintained during a period of job insecurity, and labor costs were reduced. The problems for management were that the administrative work to form teacher teams and develop schedules was increased, and that giving full benefits to part-time staff increased the fringe benefits costs.

The advantage for older workers was that older teachers who wanted part-time work were able to arrange a part-time schedule while receiving full fringe benefits. The disadvantage was that some older teachers may have felt pressured to accept part-time work when they would have preferred to continue working full time until retirement.

Phased Retirement. A public university developed a phased-retirement program in response to the 1978 Amendments to the Age Discrimination in Employment Act and to the elimination of the State mandatory retirement age. All university employees age 60+ who had 20+ years of service were eligible for the program. These employees could assume a work schedule that was gradually reduced over a certain period or a reduced schedule that remained the same over the phase-out period.

Salary was prorated on a full-time basis. These employees were eligible for all fringe benefits offered to part-time workers, and they could receive some pension income. Approximately 10 percent of the eligible employees signed up for the program.

The benefits for management were that employees sought early retirement and more options for younger staff were opened up. The problems were that paperwork in assigning employees to phased-retirement status was increased and staff time involved in devising part-time schedules was increased.

The advantages for older workers were that all older employees choosing the option could work part time and receive some pension income and employees who did not want to go from full-time work to full retirement found the option ideal. The disadvantages were that most of the older employees choosing this option who were also eligible for Social Security had to defer benefits because of earnings restrictions, and some older professors may have felt pressured to accept "phased retirement" to make room for younger teachers.

Labor Pools. A large bank decided to organize a labor pool of its own retirees. Management was dissatisfied with using a local job placement agency for temporary workers because of the high cost and problems with some temporary workers. The Employee Benefits Department announced the program in its retirement seminars and in the company newsletter.

Each year, the bank hires about 200 older workers for tax accounting and secretarial positions. They receive no fringe benefits, but continue to receive full pensions during their reemployment. The bank limits these retirees to 1,000 hours of work per year.

Management found that the plan met the need for temporary workers, achieved continuity of work because these workers already knew the organization, decreased turnover costs for temporary workforce, and increased the number of older customers using the bank.

Problems for management included a rise in the cost of liability insurance for rehired workers, frustration by some because some retirees were selective in the type of work they would do, and a limit on hours of older workers receiving Social Security as some people would work to a total that sometimes was less than the desires of management.

The plan enabled older workers to work part time in an environment they knew, and to earn wages while collecting full pension benefits. The disadvantages were that the workers received no fringe benefits and were restricted to working 1,000 hours per year.

Targeted Job Recruitment. A national fast-food chain began to recruit older persons for entry-level positions for their franchises throughout the country. Top management made this business decision after a number of franchise owners complained about the high turnover, high absenteeism, and chronic late arrival of their young employees. Older persons were recruited for permanent, part-time jobs through the State Employment Service. Television ads and posters picturing older, gray-haired employees serving customers were put in franchises along with employment application forms.

The benefits for management included a large number of hires of older workers, reduction in turnover costs, creation of a positive public image, and an increase in the number of older customers. Some personnel problems developed, however, with younger managers supervising older workers, and media advertisements were costly.

The advantage for older workers was that they obtained permanent, part-time employment with fringe benefits. The disadvantage for older workers may be that there are limited opportunities for advancement.

Job Redesign. A high-technology product manufacturing company realized that older workers receiving disability benefits tended to remain at home claiming full disability coverage rather than returning to work. The company hired one of its retired employees as a job placement worker to determine if disabled employees would come back to work if their jobs were redesigned to make them less physically or mentally stressing.

To qualify for job redesign, employees had to provide written verification from a physician as to the specific aspects of the job they could no longer perform. Then the job placement worker contacted the manager of each employee's division to determine how to modify the job.

The company retained valuable employees, saved money in employee benefits, and saved in training costs for new workers; however, time and money were required to redesign jobs.

The advantage for older workers was that they were able to retain long-held positions without excessive physical stress. The disadvantage for older workers was that they had to face some resentment from their colleagues.

Job Transfer. Another high-technology product manufacturing firm wanted to increase productivity. The union requested that older employees be given job alternatives for physically demanding jobs. After being found acceptable to management and the union, this voluntary arrangement was later written into a contractual agreement.

To be eligible for this program, the person had to be at least 55 years old with 15 years of service or at least age 50 with 20 years of service. The person being transferred had to be able to perform the new job or be willing to go through training. If the salary for the new position was lower, the worker received the average of the two salaries. In accepting such a transfer, the workers gave up their eligibility for promotion in the future. Approximately 15 percent of the people eligible for transfer accepted this option. The option was open only to production workers.

The benefits for management were that the plan maintained the job performance of older workers experiencing physical problems with their jobs, avoided potential personnel problems with older workers who no longer could physically perform the job, and reduced accidents and disability costs. The problems were that salary averaging increased labor costs, some co-workers felt resentment toward older employees who exercised this option and some managers were initially reluctant about the plan.

The advantages for older workers were that workers retained positions in the company where they had worked for many years and were less likely to have accidents on the job. The disadvantages were that workers lost an opportunity for promotion in the future and some had to accept a lower salary.

Job Retraining. In the face of rapid technological changes, an aerospace engineering firm was faced with laying off its older engineers with outdated skills or retraining them. The firm's management decided to try a voluntary, in-house retraining program. Courses were offered during lunch and in the early evening. In-house staff were used to teach the courses at no cost to participants. Advertisements in the company's newsletter listed the 28 courses offered each semester. Approximately 22 percent of the company's employees participated in the retraining program.

The benefits for management were that the training updated the skills of older engineers, promoted an extension of the engineer's worklife which may help the company avoid labor shortages in the future, motivated older persons and prevented "coasting" until retirement, and proved less expensive than hiring new employees. The problems were that management had to pay the cost of the instructor's salary and materials and the cost of time to plan and implement the program.

The advantages to older workers were that they received training at no cost, and the plan increased the chances that older workers would be able to continue working. A disadvantage was that some older workers not interested in training may have signed up just to keep their jobs.

Generally, older workers' response to work alternatives has been low. Only a small number of older workers and retired persons have taken advantage of the options available to them. Two reasons for the low participation rate appear to be the low level of communication from management to older workers about the options, and the reduction in salary and fringe benefits in part-time work and job transfers. Several of the managers who were surveyed mentioned the reluctance of older workers to request use of these options during the recent recession, when most people were just trying to hold onto their jobs.

▲ JTPA practitioners can use this research material in seminars and workshops for employers to demonstrate the following:

- o Varied approaches to using the skills of older workers,
- o Advantages of employment alternatives to employers and to older workers,
- o Types of businesses and industries that have already incorporated methods for employing more older workers in their workforces,
- o Contribution of employment alternatives to the economic health of the community.

Practitioners could also use this information to encourage and train employers to conduct an age audit among their employees and to educate older workers on employment options that might extend their worklife.

For information on the types of industries and businesses offering work alternatives to older workers and the broad categories of workers generally offered work alternatives refer to Appendix E. The primary source of this information is from NOWIS, National Older Worker Information System, developed by the Institute of Gerontology, University of Michigan.

Step 4. Determine the Appropriate Strategies for Marketing Older Workers to Private-Sector Employers.

▲ Before JTPA program operators start to develop strategies for placing older workers, it may be useful to examine some of the reasons employers have given to researchers (Paul, 1983) for hiring older workers.

Seven Reasons Why Employers Hire Older Workers

1. **Attracting Older Consumers to Their Products and Services.** Businesses are beginning to recognize the enormous buying potential of older Americans. More older models are now being used on TV to advertise a wide range of products. The tourist industry, for example, is focusing on the group of older Americans who can afford to use their leisure time for traveling.

In surveying the business community, JTPA practitioners can look for businesses and industries that have services or products that may be attractive to the older population. These businesses could be targeted for placement efforts and distribution of information on the positive attributes of older workers.

2. **Stabilizing the Younger Workforce with Older Role Models.** The fast-food industry is an example of a business in which the majority of the employees tend to be students of high school or college age, so turnover is high. Recently, these businesses have been recruiting older persons for entry-level positions. They believe that older workers will serve as role models for younger employees in their commitment to hard work.

In job development and placement activities, fast-food establishments and small businesses where a large percentage of the employees are youths would be excellent places to begin to promote

older workers as role models. JTPA program brochures and other materials can include this point.

3. **Maintaining a Desired Image of the Firm.** Many chief executives and business owners are interested in how their businesses are perceived in the community. Upholding their social responsibility is a high priority for management.

JTPA practitioners should be aware of those companies whose corporate executives, local managers, personnel directors, or owners of small businesses have become involved in social programs and community projects, or have expressed interest in the older generation in general.

4. **Gaining Experience with a Generally Older Workforce in Anticipation of Demographic Changes.** Many larger firms engage in long-range planning, with formal 3-year, 5-year, and even 10-year business plans. The managers of these firms expect the average age of their workforces to increase soon and believe that they should prepare now by gaining experience in employing retirement-age workers.

The more JTPA practitioners can learn about the workforce of a firm, the better able they will be to predict whether the firm would be receptive to hiring older workers and the most appropriate way to approach the firm.

5. **Responding to Government Policies.** Approximately one-third of the managers interviewed in one Commission-sponsored study reported that their organizations were motivated to actively recruit older persons or to establish a part-time program for older personnel after the passage of the 1978 Amendments to the Age Discrimination in Employment Act (ADEA). Two organizations that had examined the age structure of their organizations began to recruit more workers over the age of 40 for positions.

As discussed earlier, JTPA practitioners can plan seminars and workshops for employers to disseminate information. The agenda should include discussions of the provisions of the ADEA, State, and local regulations pretaining to the employment of older workers, and information on how to conduct an "age audit" for an organization. An "age audit" would allow managers to examine the age structure of their organizations and to take corrective action without the threat of legal reprecussions. Researchers found that most managers did not appear to be as knowledgeable about State and local legislation affecting the employment of older persons as they were about Federal legislation.

6. **Ensuring Productivity and Controlling Costs.** Managers have discussed this reason in rather obscure terms, rather than talking openly about it. They believe that some newly hired older persons may be content to hold entry-level jobs where turnover is now high among young workers; these older people may be satisfied not to move into career-ladder management positions. In time, the company would save money by hiring these older workers because turnover costs for entry-level positions would drop.

Generally, JTPA practitioners will want to find jobs for older workers where they will have an opportunity to advance within the company; but there may be some older workers participating in JTPA 3 Percent Programs who are interested mainly in finding a job where they like the work and environment and are not interested in the potential for promotion. Practitioners should ensure that the older worker will be satisfied with this type of placement.

7. **Influence of Older Managers on Personnel Policy.** Some older managers have been influential in obtaining flexible options in personnel policy for older workers. This may be a result of their own desire to have more options available to themselves and their peers. As they age, the managers may also have become more aware of the bias

of certain policies against older individuals and desire to change these policies.

These older managers would make good candidates for an advisory council for the JTPA 3 Percent program. They may also be willing to participate in seminars and workshops held for employers as well as to become advocates for older workers in the business community.

Summary

Basically, JTPA practitioners should remember that employers will hire older workers when they perceive it to be in their best interest. Researchers (Root and Zarrugh, 1983) use the term "synergetic" to describe the relationship which is beneficial to both employers and older workers. Employers get productive workers and older people get jobs which offer personal and financial benefits.

Practitioners may have to actively promote that it is "good business" to hire older workers. In other words, meeting the needs of the employers will also benefit program participants. This effort must be balanced with meeting the employment needs of individual participants. To learn more about the needs of employers, the establishment and use of an advisory committee is discussed in the following section.

Establishment and Use of an Advisory Committee

An advisory committee can be invaluable in the development of a comprehensive strategy to increase private-sector employment of older workers. The advisory committee can be a subcommittee of the Private Industry Council or the entire council itself. In the case of a nonprofit organization, a separate committee could be organized; however, if this is done, program operators are strongly encouraged to work closely with the PICs within their local areas. It is essential that the available employment and training services for older workers (SCSEP, Employment Security (ES), 3 Percent Programs, and other JTPA titles II-A and III programs) be coordinated and linked together to provide the most comprehensive arrangement of services possible, without duplication or inefficiency.

If the JTPA 3 Percent program has the opportunity to establish an advisory group, program operators should encourage representation of older managers, as mentioned earlier, and representatives from large and small businesses. It is important to remember that in many areas the new jobs are in small businesses; surveys have shown that it is small businesses that generally hire older workers. Moreover, many large companies may be deluged with requests for their time, money, and jobs.

Program operators should try to recruit members from a variety of industries and businesses in the geographic area being served. The committee should include a member from the Chamber of Commerce or other local business group and a representative of the Professional and Business Women's Club in the area. The latter organization may have members who would be willing to help some of the older women in reentering the labor market or starting their own businesses.

Program operators should brief the advisory group on the 3 Percent program for training older workers, describing the purpose of the

program, its requirements and limitations, and the role of the advisory group. Providing concise, written information would be useful.

Program operators should present the advisory group with facts and figures on the older workers in the area, including the following information:

- o Number of persons age 55+
- o Number of persons age 55+ who meet the income guidelines for the 3 Percent program
- o Age, sex, and minority distribution of eligible population and information on the educational level of the eligible population
- o Industries in the community where older workers are presently employed
- o Unemployment rate for workers age 55+
- o Estimates of discouraged workers age 55+
- o Estimates of persons age 55+ receiving public assistance.

JTPA practitioners can compile available labor-market information for the advisory committee from the sources listed under Step 1 of this chapter.

Questions can be prepared in the areas in which program operators need input from the advisory group for program design and implementation. The material should be organized to show where their assistance and advice is needed and how it will be used. The following paragraphs indicate the kind of information needed.

Program Planning--Where are new job openings expected? What type of training is needed for these jobs? What would be the best methods to provide this training to older workers? How can employers be involved in the training?

Employer Involvement--What are the best methods to try to get

employers in the area interested in expanding employment opportunities for older workers? Are there resources in the private sector--materials, equipment, and expertise--that could be obtained for the 3 Percent program?

Media--What kind of media exposure is needed for the 3 Percent program? Radio? TV? Local papers? What should presentations project? Major themes? What are some potential resources in the media community?

Program Implementation--What are the occupational opportunities in certain specific fields in which training is proposed, such as microcomputers? Would the proposed training meet employers' need? What are the available resources for training in this area? What placement techniques would work?

The focus for the advisory committee should be on results to be obtained, not on the planning process.

The information obtained from the advisory committee can be used to market older workers to the private-sector. As discussed earlier, businesses will hire older workers when they believe it is in their best interest to do so. Practitioners need to focus on the skills and abilities older workers have which would contribute to the productivity of businesses and firms.

Marketing Older Workers in the Private Sector

Recent research has found that marketing and placement of older workers appeared to be the strategies that had the best chance of increasing both the willingness of employers to hire older workers and the willingness of older workers to invest in continued work. The researchers noted that this fact reflected "the nature of American society, where visibility (being in the public eye) and response (a change in public attitude) are often a product of marketing that emphasized mutually beneficial objectives" (Gollub, 1983).

Operation ABLE. One nonprofit agency that has extensively marketed the older worker is Operation ABLE in Chicago. Operation ABLE, whose aim is to improve the ability of older workers to find employment, started with a planning grant from a community planning foundation and support from the Edna McConnell Clark Foundation. Over time, ABLE has made extensive use of the media to publicize the older-worker issue, developed an older-worker hotline, and developed community-employer education and advocacy programs on behalf of older workers (Gollub, 1983).

ABLE provides a central job clearinghouse to which employers may bring job openings and have them filled. ABLE also provides consultation services and technical assistance to firms. Specific activities include job evaluation for older workers, restructuring of full-time openings into part-time (shared) jobs, and access to nonprofit placement services.

During 1980, Operation ABLE:

- Placed 5,200 older workers (age 55+) in jobs through the ABLE network.
- Held an older worker job fair with a local television station and the Chicago Public Library that registered 554 older

workers.

- o Handled 1,000 employer job listings through a hotline. (ABLE, 1982)

▲ Marketing Techniques

With JTPA's emphasis on placement in the private sector program operators may need to learn marketing and sales techniques. There are two basic aspects to "selling" an employer:

(1) Finding out what the employer's needs are, and
(2) Presenting a positive characteristic of the older worker and stressing how hiring this individual will benefit the employer.

To learn what the employer's needs are, there are several avenues to pursue:

(1) Study information about the employer. This may include annual reports, quarterly statements, and other company publications. The local Chamber of Commerce may also be a good source of material.
(2) Consult with the program's Advisory Committee.
(3) Obtain information from labor market sources such as Employment Security, SOICC, business associations, etc.
(4) Meet with specialized groups of employers such as retailers, manufacturers.

An employment and training program specialist presents the following example of a possible conversation with an employer:

> **Describe the Need:** (emphasis ours)
> "In talking to employers in fast food establishments like yours, it seems that a

major concern is the high turnover rate of employees."

Provide the Benefit:(emphasis ours)
"I can help you find employees who have demonstrated their commitment to work" (McManus, 1984).

Practitioners may need to maintain a business-like approach where contacting employers, emphasizing the strengths of the participants and the program and showing an interest in the employer's problems and needs.

JTPA practitioners can look at different ways of marketing older workers by reviewing information on two CETA title III projects which were designed specifically to test whether a comprehensive marketing campaign produces good results in placing older workers in unsubsidized employment.

The Broward Demonstration Project. The Broward Employment and Training Administration (BETA) in Fort Lauderdale, Florida, was chosen to test the premise that a comprehensive marketing and information campaign could refute common misconceptions about older workers and stimulate private-sector employment opportunities for the older population in Broward County. The project, called Senior Jobs, was funded with $285,000 from the U.S. Department of Labor under CETA title III, Section 308. The results of this project may be useful to JTPA practitioners in other areas of the country.

The BETA Industry Council (BIC) selected a task force to act as liaison between the project staff and the BIC. The Senior Jobs task force members represented the financial, health care, and skilled trade industries as well as the Florida State Employment Service and various organizations and service agencies that work with older people. The

project staff relied on the expertise of members of the task force to design the training program and to target industry groups for concentrated job development.

The goals for the demonstration project were as follows:

- o Enroll 120 eligible participants
- o Enroll 50 or more participants in skills training
- o Enroll 60 participants in on-the-job training
- o Place at least 78 participants in unsubsidized employment.

The project staff included one full-time marketing coordinator, three part-time counselors, and three part-time employment specialists. Several problems were encountered with staff; the part-time counselors were not always available when the older participants needed them, so two counselors were employed fulltime. The project administrator found that an independent staff slowed down the progress, so the intake and job development functions for older workers were integrated with BETA's other employment programs. They found it saved time and money to use the existing counselors and marketing staff to handle their older worker caseload.

The Senior Jobs project budget of $285,000 provided for development and publication of a marketing package, including industry symposiums, to market older workers to private-sector employers. Approximately 26 percent of the budget went to staff salaries, 8 percent for the development of the marketing package, and 3 percent to sponsor the industry symposiums. Supportive services and training for participants comprised 50 percent of the project budget.

The paragraphs that follow describe how project staff gathered information and marketed older workers to employers.

Collection of Information. The Senior Jobs project staff

began by researching the employment and training needs of the older population of Broward County and the employment needs of the private sector. The project staff made more than 500 telephone calls to businesses in the county to ascertain the number of older workers actually employed by the businesses interviewed and the reasons why employers hired or did not hire older workers. Most employers supported the concept of a program to train older workers. Most were also willing to discuss any hesitancy to hire older workers. This information was used to plan and develop the marketing, media, and training package for the program.

The Senior Jobs project staff used the following guidelines in conducting its survey of employment needs:

1. The project staff identified a list of specific businesses in the target industries selected by the task force.
2. They developed attractive, clear, and simply written material for all callers to follow in making the telephone contact.
3. Callers telephoned a particular business and asked to speak with the owner, manager, or personnel director.
4. As the callers briefed the respondents on the employment effort for older workers, they explained that the project was gathering information for future use and not trying to solicit jobs at present. In most cases this approach was found to make the respondent more receptive to the survey.
5. Callers were direct and concise. In addition, they asked how they could help the employers. They found that a positive impression played a vital part in the followup with other businesses in the industry.

To determine the employment and training needs of the older population in Broward County, the Senior Jobs project used media

coverage to stimulate phone inquiries about the program. They talked with each older person who called in and prepared an inquiry log that could be used at a later date to set up appointments for intake for persons who appeared to meet the eligibility criteria of the program. The project staff also took the time to assess the needs of those persons who were interested in employment but did not meet the eligibility criteria for the program. They were well informed about other employment programs and resources in the area.

The 1980 Census reported that almost one-third of Broward County's population was age 55 and over. Within this population, the BETA staff found a diverse group of older workers seeking employment. Some who called the Senior Jobs project had inadequate retirement income, others were financially stable but desired to work for their psychological well-being.

The Senior Jobs project was required to serve those most in need according to their age (55+), income, and employment status. However, the staff found that many persons in the younger age groups of 45 through 54 were experiencing labor-market problems, and persons whose income exceeded the Senior Jobs eligibility criteria but was inadequate for the high cost of living in this urban area. For these people, services were sought through other agencies and community organizations thus increasing the overall employment services provided to the older population of the county.

Marketing Campaign. The Senior Jobs project staff then reviewed research on older workers in the labor market and forecasts by the Bureau of Labor Statistics. Using this information, the staff developed a comprehensive marketing approach that stressed the positives of hiring older workers while refuting the myths about them. In the marketing campaign, the staff carried the word about the project directly to business and industry leaders and used the media to reinforce and publicize the efforts to develop jobs for older workers.

The project staff discovered that for a minimal fee, most Chambers of Commerce would allow them to present a program at their monthly meeting. They were able to meet and distribute project and marketing information to one of the most active business segments in the community.

In addition, information gathered during the market survey enabled the project staff to target specific industries for symposiums, at which the staff could discuss specific needs with employers. The staff established a hotline--publicized through billboards and other advertising media--to enable workers and employers to get direct information about the project.

They distributed brochures on the positive attributes of older workers at business forums and on site to businesses. The staff produced a quarterly newsletter featuring a particular business in each issue; the newsletter was mailed to the same employers who received the brochures. Billboards and advertisements on bus benches were also used to market information about older workers.

The Senior Jobs marketing coordinator developed an audio-visual script to be used as a feature presentation on older workers to be shown to business and civic organizations. An independent contractor was hired to do the filming. The production was designed to allow 30- and 60-second advertising spots to be lifted from the piece for use as public service or paid announcements.

The Senior Jobs project staff found that news reports greatly enhanced the credibility of the project in the community. Editors proved to be cooperative in covering major events. The project staff also found that feature stories were a good way to personalize the program. The staff wrote articles that highlighted employers and workers with stories of interest to most people in the community.

The project staff suggested that, where they exist, local advertising councils can help coordinate the marketing effort and perhaps obtain the cooperation of area printers and media firms as a public service. The Senior Jobs staff suggested that where there is no advertising council, local advertising agencies may be willing to lend the public relations expertise needed to launch these efforts.

Training for Older Workers--In direct response to the surveys on the needs of private industry and the perceived shortcomings of older workers, the Senior Jobs project staff offered a range of services to older workers, including the following:

- o Preemployment counseling
- o Career-updating workshops
- o Skills training
- o On-the-job training
- o Direct placement.

To be eligible for the training, a person had to be a low-income Broward County resident at least 55 years of age, who was unemployed, or underemployed.

Results--The project enrolled 144 eligible older workers in training and job placement activities. At the end of the project, 102 of these were employed, for a 71 percent placement rate.

▲ **Summary of Marketing Advice.** The Senior Jobs project staff provided the following advice to practitioners marketing older workers to private-sector employers:

- o Determine the budget amount allowable under the terms of the contract or grant for marketing older workers.
- o Review the experiences and the material prepared by this

demonstration project and seek low-cost or free services for the program.

- o Determine the intended audience.
- o Complete the brochures and other marketing materials before advertising and holding seminars with employers so the information will be available for people to refer to after an ad is run or after meetings.
- o Meet personally with business groups and reporters; use public service announcements and talk show appearances to reinforce efforts.
- o Be sure an adequate supply of interested, trained older workers are available before marketing extensively to employers (Florida Training Institute, Older Workers: A Demonstration Project, 1983).

The San Diego Demonstration Project. The San Diego "Older Workers Demonstration Program" was authorized to serve 105 economically disadvantaged persons age 55 and over with CETA funding of $290,000. The primary objective of the project was to test the effectiveness of an operational strategy that combined comprehensive employment and training services with an aggressive marketing campaign directed at employers.

The sponsors of this program were the San Diego Regional Employment and Training Consortium (RETC) and the San Diego Private Industry Council (PIC). The sponsors subcontracted with Proven Programs, Inc. (PPI), a non-profit agency with extensive experience serving older workers, and Nuffer-Smith Associates (NSA), an advertising agency which had experience in preparing a PIC newsletter and other marketing activities. The RETC retained oversight responsibilities throughout the project.

This project included three major elements:

- o A comprehensive job training/readiness component designed to meet the specific needs of project participants.
- o A marketing and employer awareness component to sensitize employers to the benefits associated with hiring older workers, and the alternative work patterns potentially available to them to facilitate retaining or hiring older workers.
- o An evaluation component to assess the operating model and its components.

The project was able to start operations quickly because the sponsors worked very closely with their subcontractors and the subcontractors had experienced staff with expertise in working with older workers and employers.

The San Diego project enrolled twice as many women as men, a large

percentage of Hispanics, and generally a higher proportion of educated older workers than most projects. About 85 percent were high school graduates and over one-third had some college.

Marketing. All of the marketing campaign was designed by NSA working closely with PPI to coordinate the campaign with the availability of trained older workers. NSA developed a brochure as a handout for employers and devoted one issue of the PIC newsletter (with a circulation of 6600 employers) to the employment needs and potentials of older workers.

The project had little success in persuading employers to consider alternative work arrangements for older workers. They felt; however, that they had laid the groundwork of getting employers to start considering these alternatives.

In San Diego the staff contacted 492 employers in a four-month period, and identified 36 jobs related to the areas of training the older workers were receiving. They referred 35 trainees, of whom nine were hired. The reasons given for not hiring older workers were "lack of basic skills" or "too little experience." About 80 percent of the employers contacted responded favorably to the marketing campaign and indicated that they would work with the project staff when they were hiring in the future.

These efforts resulted in a 77 percent placement rate with a per placement cost of $3,246 (Department of Labor Assessment Report, 1984).

Considerations for JTPA Practitioners

Given the limited amount of funds likely to be available for marketing older workers in JTPA programs, consideration should be given to mobilizing community resources for technical assistance in the designing of a marketing scheme, production of materials, conducting surveys, and analyzing results.

▲ Some potential sources of assistance would be:

- o Local media, especially public television and college/university radio and television stations.
- o Business and civic groups, such as the Chamber and Junior Chamber of Commerce.
- o College and university classes in public relations, social research, communications, etc. that may be willing to conduct the work as a class project.
- o Coordination with other agencies such as Employment Security, Community Action Organizations, Regional Planning Commissions, etc., that may have already done some if not all of the marketing or may be willing to share the cost to produce an end product that will be useful to both agencies.
- o Private and community foundations or even large businesses that may be willing to fund a marketing project or contribute to it.

Summary of Steps in Marketing and Job Development

The National Center For Research in Vocational Education identified the following steps in their guide, Job Placement in Employment and Training Programs, published in 1983:

(1) Plan an effective marketing campaign:
- o Newspaper articles
- o Newsletters
- o Brochures or pamphlets
- o Television and radio public service announcements
- o Setting up booths at conventions and fairs
- o Holding seminars or workshops
- o "Gimmicks" (The Broward project used coffee mugs, billboards, and bus benches to advertise older workers)

(2) Develop policies and procedures for contacting employers and developing jobs.

(3) Identify employers to contact. Set up a priority system for which employers to contact first.

- o Select those employers who need employees with the skills in which the older participants are being trained.
- o Select those employers whose location is accessable to participants.
- o Select those employers with the most potential for hiring older workers.

(4) Contact employers by mail before requesting a personal meeting.

(5) Find out as much as possible about a company before making a contact. Some of the information needed is:

- o Industry and type of occupation
- o Location
- o Size--expanding or not?
- o Amount of technological change
- o How well is the business doing? (financial and managerial?)

(6) In making contacts, use the information obtained in step 5.

(7) Evaluate the approach to a firm. For example, small businesses have a large number of the new job openings, but they often have financial problems which may limit wages and opportunities for employees' career advancements. Large businesses are more likely to be unionized and need sufficient time to respond to requests for jobs.

(8) Follow-up with each employer contacted and keep a record of the contacts and the results for program evaluation.

Program Planning and Development Checklist for Working With Private-Sector Employers

▲ The following is a checklist JTPA practitioners can use in planning to work with employers.

1. Determining the workforce needs of employers.

   - o What kind of workers are employers seeking?
   - o What worker skills are desired by local employers?
   - o What is the level of education that employers require for most job openings?

2. Assessing the barriers employers face in hiring older workers.

   - o What is the attitude of local employers about older workers?
   - o What are employers' perceptions about the aging process in general?
   - o What are the major reasons employers give for not hiring older workers?
   - o What are the State and local requirements regarding mandatory retirement?
   - o How have the provisions of TEFRA affected local employers' fringe benefit costs?
   - o Have local companies used the 1,000 hours rule of ERISA to restrict the number of hours older employees can work?
   - o Are there any State or local tax policies that may affect the hiring of older workers?
   - o Is there a local economic development agency working to bring new employers into the area?

3. Reviewing techniques employers can use to increase employment opportunities for older workers.

- o What employment options are being offered by local employers to older workers? Job sharing? Targeted job recruitment? Labor pools? Job training? Job redesign? Job transfer?
- o Would employers that offer an option to older workers be willing to "help spread the word" to other employers?
- o What types of local industries and businesses offer employment options?
- o What kind of publicity has been given in the business community to these options?
- o If no employers offer any of these options, what would be the best method of introducing them to the business community?
- o How does the local business condition affect employers and the possiblity of more options to older employees?
- o Which of the employment options are the most likely to be attractive to local employers?
- o What are the best ways of promoting these options to local employers?
- o What advice has the Advisory Committee (or PIC) given on these options and their use locally?
- o In rural areas, do these options need to be modified to meet the needs of local employers?

4. Determining strategies for marketing older workers to private-sector employers.

- o Can the research findings on the reasons employers hire older workers be used to target local employers?
- o Has an Employer Advisory Committee been organized for the program?
- o What advice did the Advisory Committee (or PIC) give on the best methods to use in getting employers interested in older workers?
- o What media resources are available in the community?
- o Have the local community colleges and universities been

contacted for the availability of interns or other assistance?

- o Have other funding sources been considered?
- o What kind of training do JTPA staff members need to learn to sell older workers to employers?
- o What goals have been set for the marketing campaign?
- o What are the steps to be taken to reach these goals?

CHAPTER THREE
ADMINISTRATIVE ISSUES IN PROGRAM PLANNING AND DEVELOPMENT

This chapter deals with planning and developing the program in coordination with other agencies in the area that have a mutual interest in employment in general and older workers or older persons.

Establishing Linkages and Coordinating Services

Why should JTPA staff go through the time-consuming process of establishing linkages and developing coordination procedures with other agencies and programs? First, JTPA legislation directs coordination and use of existing resources to prevent unnecessary duplication of services at the local level. Second, there are some distinct advantages to older workers if program operators cooperate and services are coordinated.

One Commission-sponsored study (Reesman, 1983) examined the coordination between the Senior Community Service Employment Program (SCSEP) and the Comprehensive Employment and Training Act (CETA) operators. These two programs constituted the main employment and training avenues for older workers at the local level. The purpose of the study was to ascertain the advantages that coordination offered for older workers, as well as the programmatic and institutional barriers that impede coordination.

Benefits of Coordination in Employment and Training Programs

Coordination between SCSEP sponsors and CETA prime sponsors produced the following benefits:

- o Each program's resources were augmented; geographic coverage was assured.
- o Older workers were served in larger numbers and with better access to comprehensive services.
- o Cross-referral of applicants proved to be an excellent procedure for directing applicants to the program that could provide the most appropriate services to meet each applicant's specific employment needs.
- o The two programs were able to share the work of assessing and of developing plans for individual participants.
- o The sponsors could plan for older participants to enroll in both programs sequentially, when available and appropriate.
- o Waivers and clarification of eligibility requirements were obtained for the CETA program which simplified the referral process.
- o Program sponsors coordinated not only with each other but with other agencies such as health care and social services.

Methods of Coordination

Coordination can be formal or informal. Formal procedures may include contractual arrangements concerning service delivery or management activities and formal policy and planning sessions. Informal procedures include program operating arrangements such as referrals from one agency to another and informal policy and planning coordination. Most coordination between SCSEP sponsors and CETA prime sponsors was informal (Reesman, 1983).

Examples of Good Coordination Practices

In these cases, each program sponsor described the two programs as complementary. SCSEP and CETA respondents were knowledgeable about the other's services and eligibility rules. Interprogram referrals were

the norm as described by one CETA director:

> If the CETA applicant does not want or need assistance in reintegration into the world of full-time work, we will refer him/her to SCSEP. When they have applicants needing additional supportive services, full-time PSE, work experience, or training, they refer them to us. All parties agreed, however, that CETA training slots were "hard to find" for older workers (Reesman, 1983).

These sponsors did not limit their cooperation and coordination. They also established relationships with the Employment Service, community-based organizations, and the network of area agencies on aging. Most contacts were informal and related to operational issues.

Obstacles to Coordination

▲ Plan from the beginning to avoid some of the pitfalls practitioners have given as obstacles to coordination between employment and training programs:

- o Administrative structure of programs
- o Lack of program models
- o Lack of communication
- o Personalities of staff involved
- o Performance standards
- o Concentration on youth
- o Interpretation of eligibility criteria

▲ JTPA administrators may want to consider ways of structuring the coordination process:

- o Set the stage for coordination by providing interest and giving

consistent verbal support;

- o Appoint staff who have good interpersonal and communication skills to maintain informal contact with other employment and training programs;
- o Meet with other program administrators to establish the overall goals and objectives for coordination;
- o Focus on the advantages to be gained for the older workers and the training program rather than succumbing to the tendency of turf protection;
- o Work with other practitioners to design program models (combining experience and knowledge to fill the gaps resulting from the lack of formal program models);
- o Stress the employment needs of older workers and their inclusion in various titles of JTPA and coordinate the 3 Percent Programs with other JTPA programs.

Differences in SCSEP and JTPA 3 Percent Programs

Even though the SCSEP and the JTPA programs are different, they will be serving the same age constituency, and there are a number of ways the two programs can work together. Before discussing those ways, the program differences are detailed in the chart below.

SCSEP	JTPA 3 PERCENT PROGRAMS
ELIGIBILITY CRITERIA	
Age 55+ Family Income 125% of OMB level. State residency required. Priority given to persons age 60 and over.	Age 55+ Family Income "economically disadvantaged", defined as 100% of OMB poverty level or 70% of the BLS Lower Living Income Standard (whichever is higher)
PROGRAM EMPHASIS	
Part-time community service employment.	Training for older workers.
PRIVATE-SECTOR INVOLVEMENT	
Goal is to place 15% of program participants in unsubsidized employment, in the public or private sector.	Legislation requires the program to place older people in jobs in the private sector.
TRAINING ACTIVITIES	
Limited to 260 hours per year; cannot have on-the-job training contracts unless approved for Section 502 Experimental Projects.	Cannot have public-service employment and has restrictions on work experience.

Eight Ways of Coordinating the SCSEP and JTPA 3 Percent Programs.

The following are eight ways SCSEP program operators and JTPA 3 Percent program operators can coordinate the two programs. In this age of limited resources, it is essential for programs to ensure that they are not duplicating the efforts of others, and that they are using the funding they have in the most effective manner.

▲ These are some of the ways the two programs designed for older workers can cooperate to provide the best employment services possible for the older population.

1. **Joint Planning Sessions**--Some SCSEP sponsors have been operating employment programs for older workers for many years and have developed expertise on the employment needs of older workers through direct service contact with older people. They also have experience in working with local employers and other community agencies. In the planning and implementation of JTPA 3 Percent programs, this expertise could be valuable.

2. **Recruitment and Assessment**--Since both SCSEP and JTPA programs are seeking applicants age 55+, program staffs could coordinate recruitment methods and assessment procedures. During assessment, they could determine which program would be the best for their applicants.

   SCSEP would be the appropriate program to help persons who have incomes between 100 to 125 percent of the OMB poverty guidelines and who are interested in part-time work. JTPA would probably be the appropriate program for person whose income is 100 percent of the OMB poverty level or less and who have employment needs that include training. Often, this latter group will include persons who range in age from 55 to 61 and who have few financial resources. A large percentage of this group will be

older women.

3. **Joint Planning for Individual Participants**--Although many SCSEP participants may have too much income to be eligible for the JTPA 3 Percent programs, JTPA staff should not assume that all SCSEP participants are ineligible as some CETA prime sponsors did. For instance, an SCSEP participant who has no family income (this is not rare for women between the ages of 55 and 61) and works 20 hours or less per week at a job provided through SCSEP for minimum wage, $3.35 per hour, would probably meet the eligibility requirements for JTPA.

   SCSEP and JTPA could provide a continuum of services to older participants. For example, an older woman who has never worked may need the employment experience SCSEP could provide before going into training or into private-sector employment. SCSEP programs must design community service jobs to fit the needs and abilities of applicants; these jobs would give older participants the opportunity to learn about the world of work, their abilities, and training needs before entering a JTPA program.

4. **Joint Planning and Marketing of Older Workers to Private-Sector Employers**--Both SCSEP and JTPA staffs will be working to place older workers in the private sector, so it seems practical to determine how they can work together, as, for instance, on job fairs, employer seminars, and symposiums. Since the placement goal for SCSEP is 15 percent, SCSEP sponsors may not need to place as many resources in this area as JTPA sponsors, but cooperation can stretch the resources of both programs.

5. **Geographic Coverage of Program Services to Older Workers**--In planning services to local areas, SCSEP and JTPA program operators can review where the resources of both programs will be best used to ensure adequate coverage for local

communities in the service area. This is especially important for large multicounty service area and service areas made up of urban centers surrounded by rural areas.

6. **Cross-Referral of Training Activities**--Cross-referral of available training resources and discussion of common problems encountered and potential solutions in training older workers can save both staffs valuable time.

7. **Joint Training Sessions for Staff**--Joint training would be useful for new staff members of both programs who need to learn how to work effectively with older participants and employers. Also, periodic joint training sessions with ongoing staff to share new information and discuss common problems could be helpful.

8. **Development of a Network of Community Service Providers for Older Persons**--The network would include vocational education, health care, vocational rehabilitation, community action, adult education, information and referral, transportation services, senior centers, social services, nutrition programs and legal aid agencies. Researchers have found that the agencies with the best cooperative practices had an overall service strategy of cooperation with many local groups.

Checklist for Achieving Broad-Based Community Support

In order to develop an overall service strategy of cooperation with local groups, JTPA program operators need to consider the types of organizations and agencies in the area where linkages can be developed. JTPA operators also need to develop a plan of what is to be achieved by linkages to other service providers. The focus should be on the results desired from coordination. For example, The Missouri Mideast Area Agency on Aging is currently working with a private association, the Older Workers Information Council, which publicizes information about older workers. Members of the council include the Chamber of Commerce, the State of Missouri, Missouri Green Thumb (SCSEP sponsor), and other organizations for older adults.

▲ The following is a checklist JTPA program operators can use in considering organizations and agencies to develop working relationships with to build community support for the program. The research for the Commission found that the most effective methods of coordinating were the informal ones--contact of program staff members from one organization to another for referrals or to informally plan a joint program effort. This checklist contains all the key organizations to consider:

- o Employment Assistance
  - . State Employment Service
  - . Private Industry Councils (PIC's)
  - . Local/City governments

- o Business
  - . Chamber of Commerce
  - . National Alliance of Business
  - . Trade associations
  - . Professional and Business Women's Clubs

- Network of Organizations on Aging
  - State Office on Aging
  - Area Agency on Aging
  - Senior Centers
  - Senior Nutrition Programs

- National Organizations on Aging
  - American Association of Retired Persons
  - National Council of Senior Citizens
  - National Council on the Aging
  - National Caucus and Center on Black Aged
  - National Urban League
  - National Association of Spanish-Speaking Elderly
  - Green Thumb
  - United States Forest Service

- Education
  - Community colleges
  - Public universities
  - Vocational education institutions
  - Adult education centers
  - Technical training centers

- Social Service Organizations
  - Social services
  - Health care
  - Community action
  - Housing assistance
  - Transportation services
  - Legal aid
  - Information & referral
  - Vocational Rehabilitation

- Community Groups

. Older Women's League
. Lions Club
. League of Women Voters

Summary

This chapter has emphasized the value of coordination and developing strong linkages with other organizations and agencies that are working with the older population. These activities require time and planning by practitioners but the value to the program in the long-term justifies the time taken for planning and initial contacts. However, program operators should have goals developed to work toward in coordination and it should not be allowed to become an aimless activity.

Program Development Checklist for Working with Other Organizations and Agencies

▲ The following is a checklist for use by program planners and administrators in the establishment of a broad-based community network for training older workers.

- o Who are the key community leaders on issues about employment and training?
- o Has the local Chamber of Commerce or other business groups been contacted for discussions on employment and training problems of older workers?
- o What public agencies and community organizations serve the older population and could become involved?
- o Who in the business community would be willing to assist in the development and implementation of the training programs?
- o Who are the educators involved in planning educational services for the adult learner?
- o Who are the potential media contacts in the community?
- o Can a coalition be created among public agencies, private businesses, and community organizations to develop strategies for the program to address the employment and training problems of older workers?

PART THREE

PROGRAM OPERATION

This part outlines the various components for JTPA 3 Percent Programs for recruiting, training, and placing older workers. Volumes of information are available on program models for youth employment and training programs. Unfortunately, over the years there has been much less emphasis on developing and evaluating different program models for older workers, so there is little information available. The basic information a practitioner would need to begin working with older workers is given in this part.

If a program operator is subcontracting for recruitment, assessment, training, and placement of older workers, careful consideration should be given to those organizations that have had extensive experience with serving older workers and knowledge of the employment needs of persons 55 and over. Program operators should evaluate potential contractors on the expertise of their staff in working with older workers and employers. With experienced staff, start-up time for program operations would be shortened as the necessity for hiring and training new staff is eliminated thus program activities could be initiated quickly.

Methods of Recruitment. Many practitioners under CETA and SCSEP found that they could not simply place a few articles in local newspapers and get the response they were seeking from the older population. A number of reasons may contribute to the lack of response from older people:

- Discouragement in seeking employment
- Belief that they are too old to be trained or to take a new job
- Caution in trying something new
- Strong belief in independence, not wanting to accept help from

government programs
- o Shortage of peers in employment and training programs
- o Lack of general information about employment and training programs
- o Shortage of peers working or seeking work.

Recruitment in rural areas may take longer because of geographic distance and the staff time needed to reach the older population. Recruitment by "word of mouth" often becomes more important there. JTPA program staff may need to set up recruitment centers in rural areas using local facilities such as churches, senior centers, schools, and health centers. Generally, these facilities are available at little or no cost.

Program staff should use as many of the following avenues for recruitment as necessary to attract older applicants to the program. After interviewing the applicants, staff should collect statistics on how applicants heard about the program and evaluate which methods were most timely and cost efficient for future recruitment efforts.

The following lists possible ways of recruiting older workers; all of the suggestions may not have to be used, especially if there is a strong network within the older community.

Suggested Resources for Recruitment

- o Publicity
  - . Local newspapers (classified ads, human-interest stories)
  - . TV and radio public service announcements
  - . Local newsletters and church bulletins
  - . Notices placed in local stores, senior citizen centers, libraries, public transportation sites, and so on.

- Referrals from other agencies
  - Area Agency on Aging
  - Social service agencies
  - Health care agencies
  - Employment Service offices
  - Vocational rehabilitation agencies
  - Housing assistance agencies
  - County government personnel office
  - Transportation agencies
- Local community leaders
  - Mayor's office
  - County officials
  - Labor unions
  - Civic leaders
- Community-based organizations
  - Local SCSEP sponsors
  - Employment organizations for older persons
  - Local chapters of the National Urban League, National Center for Black Aged, National Association of Spanish-Speaking Elderly, and other minority groups
  - Women's groups (Older Women's League, Coalition against Domestic Violence, Displaced Homemaker Programs)
- Community group appearances
  - Local chapters of the American Association of Retired Persons
  - Local Senior Centers
  - Church groups
  - Civic groups

- o Local educators
  - . Adult education centers
  - . Community colleges
  - . Technical schools
  - . High school principals
- o Local meetings and events
  - . Visit senior nutrition sites
  - . Set up booths at local fairs, conferences
- o Volunteer use
  - . Make door-to-door contacts in hard-to-reach areas
  - . Answer telephone inquiries about the program

In the past, some programs that have emphasized occupational training advertised for applicants by stating that they were looking for people interested in training in a particular field. These applicants were tested for their interest and aptitude for the training being offered. The chances of "creaming" among older applicants increase with this method as persons who do not have an interest and aptitude for a certain type of work are eliminated. This method of recruiting may not provide as much attention to the individual needs of older applicants as other methods, and may not help those persons in greatest financial need.

Researchers (Rupp et al, 1983) noted that targeting a particular group (e.g., handicapped persons) does not necessarily succeed in getting persons from this group to apply and participate in the program. Program operators may have to make a concerted effect to reach a targeted group during the recruitment process. Also, the

special needs of such a group must be considered when planning training and supportive services.

Recruitment Results

The S^{3}AGE Project in Washington State, a demonstration project for mid-life and older workers funded under CETA, found that they needed to talk to **twice** as many older applicants (55+) as were enrolled in the program. This project made two recommendations for recruiting older workers:

(1) CETA sponsors and Private Industry Councils (PICs) should highlight service to older workers in their recruitment/promotional efforts as a means of attracting and enrolling this target population; and
(2) strong "networking" activities should be emphasized between CETA programs and SCSEP program sponsors (Snedeker Scientific, 1982).

These recommendations are certainly appropriate for JTPA training programs.

The Employment Action Center (EAC), operating with JTPA funding through the Hennepin County Private Industry Council in St. Louis Park, Minnesota, found two methods of recruitment to be effective for their older worker demonstration project:

(1) Advertisements in the employment want-ad section of the Sunday paper (a much-used method of job hunting by older workers); and

(2) Church mailings and posters placed in churches (Henry and Teschendorf, 1984).

According to the project's final report, the project staff recruited for two and one-half months and enrolled a total of 31 persons age 45 and over. Fifty-eight percent of the participants were in the 55 to 65 age group and no one in the program was over age 65.

The staff of the EAC project in Minnesota learned that the intake process with older workers required "more time, patience, diplomacy and extra efforts" (Henry and Teschendorf, 1984). Some reasons that this extra time and effort were required include:

(1) A high rate of ineligibility for JTPA applicants over age 55 was found.
(2) Older workers needed more clarification on program operations (e.g., explanation of OJT, Job Clubs, etc.) and their responsibilities. Some applicants believed the project already had jobs waiting for them.
(3) Older workers were frustrated and angry over the economic situation, their unemployment, and perceived discrimination by employers (Henry and Teschendorf, 1984).

▲ Methods of Selection

Program staff should interview each applicant to determine eligibility at a site affording privacy. Staff should take care to explain why financial information is being sought before asking for specific income figures. Some older persons resent what appears to be an intrusion into their private lives, but explaining the reasons for the information may alleviate this concern.

Staff should tell persons who meet the eligibility criteria for the program about the selection procedures established by the program and how any waiting lists will be used. Staff may also want to inform applicants as to when they will be notified concerning selection for

participation in the program.

The staff should be prepared to determine the needs of people who are ineligible and to refer them to appropriate agencies and service organizations. Giving the ineligible applicants the name of a specific staff person to talk with in the agency to which they are being referred often makes it easier for older persons to seek further help.

The regulations for the SCSEP provide priorities for enrolling applicants as those 60 and over and those "most in need" are given consideration. Due to large numbers of potential applicants to the JTPA 3 Percent programs, operators may want to establish a system of selection priorities.

Under CETA, some prime sponsors established a rating system to rank applicants. When there were more than could be enrolled based on characteristics associated with greater need, applicants with the highest "need" ranking would be enrolled first (Trego, 1984).

Program operators will also want to assess the appropriateness of other programs in the community (SCSEP, JTPA, title III Dislocated Worker Programs, and other JTPA title II-A Programs) to decide which program might offer those services which would best enhance the applicant's chances for employment.

Methods of Assessment

The assessment process is designed to increase the size of the older workers' job market by highlighting the transferability of skills and the level of skills that can be built on by training. The assessment process increases older workers' self esteem as they learn to identify their marketable skills.

Assessment techniques for older workers are similiar to techniques useful for other applicant groups. This section discusses the methods of adapting assessment techniques to special situations presented by older workers.

"Active listening" techniques that allow older workers to tell their stories in their own way, is one of the most effective techniques for initial interviews. A more traditional interviewing approach can be used in subsequent meetings when employability plans are being developed. For example, the need of an older man who has gone through a harrowing experience in job hunting to express what has happened and how he feels about it must be met before he can consider other possible solutions for his employment problems. Through a nonjudgmental approach, program staff can make older persons more receptive to suggestions and encourage them to provide useful information on the topics discussed below.

- **Education**--Staff should obtain information on the level of education achieved and any recent training; the length of time since schooling should be noted. However, the grade level may not reflect the functional level, and further information may be required to determine if an applicant will need to improve basic reading and writing skills.

- **Work Experience**--Staff should review each applicant's entire work history and record all significant information that would provide a basis for classifying skills and knowledge. Older workers with an extensive work background have acquired sound work habits and occupational skills over the years of their employment. It is the job of the interviewer to determine what these habits and skills are and how they can apply to the local job market. Defining skills in multiindustry occupations is necessary to target job placement efforts and to determine training needs.

For older women who are reentering the job market or have never worked outside the home, staff should obtain information on their responsibilities in the home. For instance, a women might have helped with a spouse's or friend's business and obtained marketable skills. Some civic or volunteer experience can be vocationally significant, especially for older women, so this area should also be carefully explored during assessment.

- **Prior Job-Hunting Experience**--Staff should record the length of time applicants have spent in job seeking, methods used in the job hunt, and types of employers contacted. Reviewing this information for all older applicants will give the staff an indication of the level of job-seeking techniques among the applicants and the types of employer contacts that have not been successful for them as a group.

- **Attitudes**--Older workers, especially those who have sought employment for a lengthy period, may show evidence of low morale, discouragement, anger, and a feeling that they are not wanted in the labor market. Staff should expect and accept such attitudes in view of the frequent rejections older workers experience in their search for employment.

The Employment Action Center (EAC) project in St. Louis Park, Minnesota, found that the anger and frustration experienced by older workers often spilled over into job interviews. This project reported, "Joblessness, always hard to swallow, hits older men and women especially hard. Their lives soured at a time when they were expecting to begin reaping the fruits of their labor and when they could be taking things a little easier" (Henry and Teschendorf, 1984).

This project provided individual counseling and a peer support group. The project reported that peer support group

meetings on Mondays were "a catalyst to action" that gave participants a good start for job hunting. "It offered them a positive, accepting environment in which they could **release** their frustrations" (emphasis ours)(Henry and Teschendorf, 1984).

The EAC project also reported other complicating attitudes such as:

- o A negative view of working under younger supervisors and with younger co-workers.

- o Unrealistic employment and salary expectations based on their prior experience with one company or long experience in a certain occupational field.

- o A sense of having lost their identity and "their place in society" (Henry and Teschendorf, 1984). Perhaps the most distressing change in these older individuals was their bitter feelings towards a system in which they had believed and supported by hard work and loyalty.

- o **Personal Characteristics**--Dependability, flexibility, ability to accept supervision, and safe work habits may be some of the personal characteristics employers will consider in hiring older workers. These characteristics can sometimes be determined by the applicants' behavior during interviews, in their work histories, or life styles.

- o **Vocational Testing**--Some employment and training program sponsors have found that older workers have difficulty taking vocational tests. Some sponsors have allowed older workers time to practice taking tests, some have adjusted the tests to their clientele, and some have provided training on testing. Because most vocational tests were designed for a younger population and

older workers exhibit problems with such testing, these tests should be used more as a guide along with other factors in developing an employment plan for the older person.

Placement specialists with the San Diego Older Workers Project, funded under title III of CETA, used the Educational and Industrial Testing Service (EDITS) vocational assessment series of tests, which include the following:

COPS--The California Occupational Preference System, which measures interest,

COPES--The Career Orientation Placement and Evaluation Survey, which measures work values,

CAPS--The Career Ability Placement Survey, which measures abilities, including mechanical reasoning, verbal reasoning, language usage, work knowledge, numerical ability, and manual speed and dexterity.

Interpretation of these measures is organized around a group of occupational clusters, which represent all jobs. Vocational testing for aptitude and interest for a particular vocational field have been found to be useful in programs emphasizing classroom training.

The COPS vocational interest test can be administered in about twenty minutes and can be self-scored, thus providing immediate feedback to the participant. COPS is written at a sixth-grade reading level and was developed from research into the structure of occupations (Bhaerman et al., 1983).

The National Center for Research in Vocational Education advises employment and training practitioners to determine the measurement areas needed for the program. These areas may include one or more of the following related to:

- **Placement in training**-interests, job-related abilities, aptitudes, attitudes, and achievement levels.

- **Skills needed for job placement**-specific job skills, unique job requirements, specific employer demands, specific worker responsibilities, skills with special tools or instruments.
- **Worker traits for job placement**-tolerance levels, temperament, motivation.
- **Counseling and guidance**-The Research Center also advises practitioners to "provide participants with the exact reasons for selecting each test, and to explain to participants how results will be used, exactly what the results are, and what they mean" (Bhaerman et al., 1983).

For more information on vocational testing, refer to Testing in Employment and Training Programs, published by the National Center for Research in Vocational Education, Ohio State University, Columbus, Ohio, 1983.

In discussing various occupations with older workers, staff should provide the following information:

- Physical and other requirements of the job (especially important in some health-care positions)
- Amount of training needed
- Work environment they can expect to encounter
- The amount of pay they can expect to receive.

Older workers should be encouraged to use this information to evaluate themselves and the appropriateness of a particular occupational field.

Most older workers will find this type of career assessment and planning a new experience. Some will emphasize that they are interested only in a job, rather than a career. Explaining how this process will identify types of jobs that may be suitable for them will encourage them to cooperate.

Assessment Tools

The S3AGE project in Washington State used three assessment instruments: The Cornell Medical Health Index, The Psycho-diagnostic and Therapeutic Evaluation (PaTE) Report, and the Luscher Color Test. The findings of the S3AGE project about older participants and testing were:

- Extensive testing is not necessary for those program participants who are knowledgeable about their skills and have a positive attitude, recognize technological and job market changes, and are doing well in identifying the type of work they are able to do.

- Testing is not appropriate for those participants who are extremely bitter, rigid and fragile, and "blame" employers for not hiring them. This project recommended individualized counseling instead of testing for participants who are found to have difficulty in evaluating themselves and the labor market and to make adjustments in their attitudes.

- Participants who had not made an effective self evaluation and appraisal of how they could fit in the labor force were found to benefit from diagnostic testing in the assessment process. These individuals were found to be generally productive with good work histories, but were suffering some pain from their joblessness. They were generally developing a willingness to adapt to changes in the occupational marketplace and the tests were found to help these individuals adjust and regain employment (Snedeker Scientific, 1982).

The S3AGE Project made the following recommendations about assessment tests for older workers:

- The Cornell Medical Health Index was recommended for all older participants because it could be used for self-evaluation to determine physiological ability to obtain and maintain employment and/or to participate in vocational training.

- The PaTE test was found to be most effective for determining the appropriateness of long-term vocational training. The PaTE test results must be evaluated and interpreted to an older participant by a trained psychologist. It was determined to be cost effective and useful to older workers in determining vocational direction.

- The Luscher Color Test was found to provide highly useful and accurate information about an individual. This test was used to help counselors and applicants to determine appropriate employment and training activities. The project learned that the Luscher Color Test was less restrictive and easier to administer and interpret the results. It may be evaluated and interpreted by a trained employment and training practitioner. Thus the S3AGE Project recommended the use of the Luscher Color Test as a primary assessment tool for older workers and the PaTE for those older workers considering long-term training (Snedeker Scientific, 1982). The importance of thorough and accurate assessments can not be stressed enough. This factor is the key that will lead to the identification of what type of training activity within the program is most appropriate and will establish a definite goal for the older worker and the staff to work towards.

Development of an Employability Plan

The most important aspects of employability development are joint development of a step-by-step employment plan by older workers and staff and joint, periodic evaluations of progress. Participants should

be encouraged to discuss with the program staff any problems as they arise and to suggest how they can be resolved. In other words, the program staff should make full use of older workers' maturity and problem-solving abilities.

Training

Depending on the participants' needs and available resources, the staff can arrange for remediation skills training, occupational skills training, on-the-job training, work experience, and job search training.

In working with educators and trainers, JTPA staff should specify the goals for the training and provide to the trainers the results of the assessment of participants: age-related factors, level of education, functional level, and problems that could affect training.

Some sponsors of SCSEP Section 502 experimental projects have found that when placed in classroom training with younger persons, older workers did less well than their younger classmates and needed more academic counseling. Other SCSEP sponsors have observed that older workers started slowly in a classroom setting but showed marked improvements by the end of the training period.

The San Diego Older Workers' Project always tried to place at least 2 older trainees together in a class with younger students to promote the "buddy system" and to ensure support during training.

Some older-worker project administrators have invited local employers into the classroom to see for themselves what is being taught and how the training is being conducted. Others have invited employers to help develop the curriculum and to teach some classes or to send an employee to teach a class. (One project that contracted for training with a community college had the college help promote the training to

businesses to reduce their resistance to hiring older workers.) Employers have also offered valuable input on sequencing of course work and duration of training.

Programmed instructional materials that can be used by trainees at their own pace has been found to be successful with older persons.

The S^{3}AGE Project in Washington findings indicate that additional training is necessary for some older workers to participate in today's job market. This was found to be particularly true in the office occupational field because of the new technologies such as word processing and computerized accounting programs. A lack of financial resources and the need to obtain money for basic survival were detriments to further training for S^{3}AGE participants. The project staff found that older participants most in need of upgrade training had the most dire financial situation. The project staff presented these recommendations for JTPA percent programs:

- o Open entry/open exit classroom training for older workers.

- o Practitioners' knowledge of training institutions and, specifically financial aid personnel within these institutions to assist program participants in getting financial support for training (Snedeker Scientific, 1982).

Open entry/open exit training provides more flexibility for program participants and has the potential to reduce training costs because participants leave the class after mastering the desired skill or skills and do not receive unnecessary training (Trego, 1984). Open entry/open exit training may require more planning and decisions must be made concerning:

(a) How the curriculum can be designed to include modules of training instruction.

(b) Open entry policies (whether a participant could enter at any time or only at the beginning of specific training units).

(c) Open exit policies (whether the class would be entirely self-paced, have one or more exit points after the completion of individual modules, or exit at the time of unsubsidized placement).

(d) Skills to be learned and the level of performance desired (Trego, 1984).

Open entry/open exit training can also be accomplished by "training in occupational clusters or tiered training modules" (Trego, 1984). Trego gives the following example of training in occupational clusters:

> "A cluster of modules on auto maintenance, might include among others, a module on front end alignments, another on brake servicing, and another on muffler installation. An enrollee with pressing family responsibility might take just the first module, perhaps in combination with job survival skills training, and then get a job as a front end specialist. Another enrol'ee may be preparing herself for a generalized auto maintenance position; she would take all modules in the cluster except those she had already mastered."

Trego defines tiered training modules as, "a series of training modules which build upon the skills learned previously." Tiered training modules for older workers learning microcomputers, might include the following four modules:

Simple Data Entry

Word Processing
Computer Operation
Computer Programming

The length of each training module planned would depend on the level of proficiency required for the job and time needed for a participant to master the skills needed at the desired level.

It may be impossible to provide all levels of training for some JTPA 3 percent programs due to funding limitations and restrictions. However, an older worker might complete the first two training modules in the JTPA 3 percent program and later, after becoming employed, attend a community college or technical school to obtain additional higher level skills.

Practitioners can be helpful to older workers by becoming knowledgeable about financial assistance programs that older workers might use to obtain further training which may not be available under JTPA. Such information on grants, loans, and scholarships can be obtained by writing to local educational institutions' financial aid offices.

Recognition for older persons who complete training (certificates, diplomas) is generally appropriate. Presentation ceremonies also provide an opportunity for media coverage of success stories.

Placement

Placement efforts begin in the program-planning stage. Several older-worker projects found that employers who were heavily involved in program planning were also more committed to the program's success, both by hiring older workers who were trained and by promoting older workers to other employers.

Some participants may experience difficulty in finding employment after being trained in job search techniques and receiving individual counseling. Placement efforts may need to be concentrated on a one-to-one basis, with more emphasis on job development.

Both l rge and small employers should be involved in placement efforts for older workers. A survey in New York State conducted by the Florence Burden Foundation and a local chamber of commerce found that many small businesses hire older workers (Gollub, 1983). As we saw earlier, the CETA title III project in San Diego, California, reported 80 percent of new hires in small businesses.

When working with large employers, program staff may find that although contact with the central corporate level sets the stage, follow-up may be needed with the local personnel officer or manager who actually does the hiring. The local manager is concerned about personnel needs, production schedules, and controlling costs of the local operations; thus, direct contact with this person about the abilities of a specific older worker may produce better results than a policy directive from headquarters promoting the hiring of older persons--although policy directives are certainly to be encouraged.

Some program operators have found that some employers are more willing to hire an older worker directly than to participate in an on-the-job training arrangement. Employers who are reluctant to enter into training agreements have cited their lack of need for financial support and eagerness to avoid becoming involved in "red tape." Data collection on the type of employers (large, small, manufacturers, service producers, etc.) who are willing to enter into training arrangements would be valuable information for future program development and evaluation.

Follow-up

JTPA program staff should complete a 30-day follow-up on all

participants to obtain information on their employment status and their evaluation of participation in the program.

The staff should obtain this information needed on employment for evaluation purposes: job title, length of time held, number of working hours, wages, additional training received on the job, satisfaction with the work, and so on. Part Four in this guide discusses program evalution in more detail.

Although the JTPA program does not require follow-up on participants beyond a 30-day period, it may be advantageous, when staff resources permit, to do follow-up on a 60- and 90-day basis. This follow-up could provide information on placements related to kind of training, adaptability of older trainees to various kinds of training, older worker and employer satisfaction, and replicability factors related to the program.

Researchers (Pritz et al., 1983) have identified the purposes of follow-up activities as the following:

- o Reporting for accountability
- o Planning
- o Program evaluation and improvement
- o Labor market information
- o Follow-through with participants

Each of these purposes directly relates to older worker training programs, and can be useful for program administrators and planners in deciding on follow-up methods to incorporate into the program.

Researchers (Pritz et al, 1983) have outlined some of the advantages for using these purposes to develop a follow-up plan:

- o Enables programs to meet reporting requirements established at

the State and Federal level.

- o Obtains feedback from the participants after they have been working on the job.

- o Helps identify improvements needed for training, supportive services offered, and assessments of participants' skills and abilities.

- o Obtains employers' input about the participants' performance and suggestions for improvement of the training program.

- o Identifies those participants placed by the program who remain employed but are having problems adjusting to their job.

- o Supplements information on employers regarding the level and types of hiring and workforce needs.

Older workers should be informed during the training about follow-up contacts to expect after termination, the reasons for the contacts, and the benefit to themselves and to others who may be served by the program at a later date. Older workers are often willing to fully cooperate with staff when they understand that they may be helping their peers.

When employers are contacted, the opportunity should be used to learn about the employers' perceptions about the training program (i.e., performance of older workers on the job, attendance, level of skills, work relationships and dependability), to receive suggestions from the employer for training improvements, and to discuss with the employer the potential for their cooperation with the program in the future.

A program may need to develop a system for follow-up activities,

including collecting and analyzing data obtained. Practitioners can use the information to find trends; for example, the San Diego Older Worker Project under CETA found that on-the-job training (OJT) resulted in the highest entered employment rate (91 percent) with the lowest average wage rate obtained ($4.48 per hour), while the entered employment rate for classroom training (71 percent) was much higher than anticipated and resulted in the highest average wage rate obtained ($5.42 per hour).

The project staff surmised that the OJT placements were generally entry-level positions with corresponding entry-level wage rates, while the concentrated skills training provided in a classroom setting enabled the older workers who successfully completed the course to compete for the higher positions with higher wage rates. Based on their analysis, the project made plans to link short-term OJT upon completion of classroom training for a limited number of participants to assist those who might have the most difficulty in finding employment after receiving skills training. They also planned a limited work experience program to be linked with classroom training.

Practitioners who want further information on follow-up activities are directed to Follow-Up and Follow-Through in Employment and Training Programs, published by the National Center for Research in Vocational Education, Columbus, Ohio, 1983.

Checklist for Program Operation

▲ The following is a checklist that program operators can use in planning for the recruitment, training, and placement of older workers.

1. Recruiting program participants

   - o Has the media been consulted for publicity for the program?
   - o Has a network system been developed to receive referrals from public agencies?
   - o Who are the key community leaders to contact for promoting the program?
   - o Can volunteers be recruited for contacting older persons in hard-to-reach areas?
   - o Have local educators and community-based organizations indicated their willingness to assist in recruiting?
   - o Have plans been developed to set up information booths at Senior Centers, nutrition sites, and other local events that attract large groups of older people?
   - o Has a procedure been developed for evaluating the effectiveness of the recruitment process?

2. Determining eligibility and selecting participants

   - o Is the program staff familiar with the regulations for determining program eligibility?
   - o Have selection procedures been established?
   - o What resources have been developed for assisting those persons who are ineligible for the program?

3. Assessing program applicants

   - o Is the format for obtaining the applicant's work history and personal information comprehensive but also easy for program staff to follow?

- o Are resources available for vocational testing?
- o Should the vocational tests be adjusted for older persons?
- o Have ways of preparing the older applicants for testing been considered?
- o How will vocational tests be used for the development of employment and training plans?
- o Has the following information been prepared on various occupations for use by older applicants: physical capability required, amount of training needed, hours of work, requirements of the job, environmental factors, and amount of pay?
- o Has the need for supportive services been assessed for each applicant?
- o Have the participants been given the opportunity to learn how to evaluate their own interests, skills, and abilities?

4. Developing employability plans

- o Has a plan for employment been developed jointly with each program participant?
- o Are periodic meetings scheduled for evaluating progress with each participant?

5. Providing training

- o Have performance-based contracting procedures been considered?
- o Are requirements for OJT contracts completed with written explanations for employers and older workers?
- o Are employers involved in the curriculum development and evaluation of classroom training?
- o Will older participants be given the opportunity to evaluate the training they receive?
- o How will participants who complete training be recognized?

6. Placing the older worker

- o Have job search assistance groups been considered?
- o Is individual counseling available for older workers with special problems in job seeking?
- o Have the employers involved in the planning of the training been requested to promote older workers in the business community?
- o Has a system been developed for tracking placement efforts with small businesses?
- o Are contacts scheduled with the central headquarters and local managers of large employers?

7. Follow-up for program participants

- o Has a system been developed for tracking participants to ensure a 30-day follow-up?
- o Is the format for follow-up easy to use by program staff?
- o Has the follow-up system been explained to participants to ensure their cooperation?

PART FOUR
PROGRAM EVALUATION

Measuring Performance and Evaluating Results

Performance standards are an integral part of JTPA programs. The reason for this is that Congress recognized that job training is an investment in human capital that requires evaluation.

The basic measures of performance for adult training incorporated in the Act under title II are:

(1) an increase in employment and earning; and
(2) a reduction in welfare dependency. (Section 106 of JTPA)

The Secretary of Labor is directed to establish the performance standards with advice from the National Commission for Employment Policy on the usefulness of the standards and the potential impact of the standards on who will be served, what services will be provided, and the cost. The Commission staff have been involved in the development of standards for title II adult programs.

As of this time, the Department of Labor has not published any performance standards for the JTPA 3 Percent Set-Aside Programs for training older workers.

The performance standards that have been established for Title II adult training programs consist of two sets of standards--one for the first 9 month operational period (October 1, 1983 to June 30, 1984) and a second set for the first full program year (July 1, 1984 to June 30, 1985).

Performance Standard	9 Month Period	1st Year Period
Job Placement Rate	58 percent	55 percent
Average Wage to be Obtained	$4.90/hour	$4.91/hour
Cost per Placement	$5,900	$5,704

JTPA is expected to show a result at least 10 percent better than CETA did overall on various standards. The Governor has some discretion to set variations in the standards based on economic, geographic, and demographic factors in the State, the characteristics of the population to be served, and the type of services to be provided (Section 106(e) of JTPA). The Governor may also take into account the service provided to older workers in this analysis, as they are considered to be a hard-to-serve group compared to prime age individuals (age 22 to 54).

3 Percent Training Programs

Since it is possible for performance standards for the 3 Percent Training Program to vary from State to State depending on administrative (e.g., State requirements) and programmatic factors (e.g., program services), the data collection procedures included in this material could be used by any 3 Percent Training Program. It is left up to program operators to decide what is applicable to their particular program given budgetary restraints and administrative requirements.

Ideally, data collection should include information on program applicants, program participants, training results, special populations served, employers, and the impact of the program on the community served. Realistically, data collection will depend on program resources (staff and funding) and specific reporting requirements (Federal and State).

▲ For planning and evaluation purposes, program operators need the following facts and figures on the older population in the area the program is serving:

- o Number of persons age 55+
- o Number of eligible persons 55+
- o Demographic characteristics (age, sex, and minority status) of the eligible population
- o Industries in the community where older workers are presently employed,
- o Unemployment rate for workers age 55+
- o Estimates of discouraged workers age 55+
- o Estimates of persons 55+ receiving public assistance (food stamps, welfare, medicaid, etc.)

The reason for gathering this information is that an assessment of eligibility and participation rates of older workers is an important factor in the evaluation of employment and training programs aimed at improving the economic well-being and labor market opportunities of older Americans.

A list of questions have been compiled which, when answered, will provide program operators with the data needed for program evaluation and analysis. This list is a guide that was prepared for the ideal situation which no program will have, thus operators will have to decide how much of this format is appropriate for their program.

A comprehensive, computerized management information system (MIS) would provide much of this information without requiring too much of the program staff's time for compilation of statistics, but this may not be available to all 3 Percent Training Programs.

Data Collection

▲ Answers to the following questions can provide much of the data needed for program evaluation and analysis.

Older Persons Who Applied for Program Services

- How many older persons applied for program services?
- What were the personal characteristics of these applicants (age, sex, ethnic background, education, and income)?
- How do the characteristics of the applicant population compare with those of the eligible population in the area the program is serving?
- If certain groups of older persons were targeted for recruitment, were these goals met?
- How long did it take for the program to recruit the number of persons required to meet training goals?

Program Participants

- How many persons were selected to participate in the program?
- What were the personal characteristics of this group (age, sex, ethnic status, education, income, family size)?
- How do the personal characteristics of the participant population compare with those of the eligible population?
- How many participants successfully completed the training? How do the characteristics of this group compare with those of the entire participant group?
- Are there any trends in the number of participants who successfully completed training compared to the total number of applicants and the total number of participants?
- How many participants had obtained employment at the end of their training period? 30 days later? 60 days later?
- What supportive services were requested most often by program

participants?

- o With cost restrictions for supportive services, have resources in the local area been sufficiently explored?
- o What was the status of applicants who had not been selected for the program nine months later?

Training Results

To assess the effectiveness of various kinds of training, program operators can establish a chart similar to the one shown below. Enter the results for each kind of training listed. (The "combination" column is for persons receiving more than one type of training such as classroom training and short-term on-the-job training).

	PROGRAM TOTALS	OJT	CLASSROOM TRAINING	WORK EXPER	JOB SEARCH	COMBINATION
PERSONS SERVED						
PLACEMENT RATE						
OTHER TERMINATIONS						
EARNINGS GAIN						
AVG WAGE OBTAINED						
WEEKLY HOURS						
RETENTION RATE AT 30-DAY FOLLOWUP						
COST PER PLACEMENT						

- o Compare the results of each of these training activities.
- o Which kind of training appeared to have the best results overall?
- o How did the participants evaluate the type of training they received?
- o What were the participants' suggestions for improving the

training? For the duration of training? For the methods of training?

- o What is the potential for training and advancement for those participants obtaining employment?
- o What is the status of those participants who have not obtained employment at the 30-, 60-, and 90-day followup? Are they participating in another training program? Do they have poor health? Are they looking for work? Do they still have a desire for employment?
- o What factors in the training activities offered to participants appear to be affecting the placement rate?
- o What was the average length of unemployment for the participants before training?

Special Populations Served

Older Women

- o What percentage of the applicants were women?
- o What percentage of the participants were women?
- o What kinds of training were provided to older women?
- o What percentage of women successfully completed each kind of training?
- o With each type of training provided, determine the placement rate, average wage obtained, pre- and postprogram wages, number of hours working, and retention rates for female participants.
- o What types of training appear to have the best results for older women?
- o What were the characteristics of the older women who were placed in unsubsidized employment?
- o What were the supportive services most needed by older women?
- o How did older women evaluate the training they received?

Displaced Older Workers

- What percentage of the participants were displaced older workers?
- With each type of training provided, determine the placement rate, average wage obtained, pre- and postprogram wages, number of hours working, retention rate, and cost of placement for older displaced participants.
- What type of training appeared to have the best results for them?
- How did the older displaced workers evaluate the training they received?
- What were the supportive services needed most by displaced older workers?

Older Minority Persons

- Were there any problems in recruiting older persons of minority background for the program? How many were applicants?
- How many older minority persons were participants? What were the characteristics of these participants?
- What percentage of the older minority participants successfully completed training? What were the characteristics (age, sex, education, income) of these participants?
- With each type of training provided, determine the placement rate, average wage obtained, pre- and postprogram wages, number of hours working, retention rate, and cost of placement for older participants with minority status.
- What type of training appeared to have the best results?
- How did the older minority participants evaluate the training they received?
- What were the supportive services needed most by older minority persons?

Employers Who Had Contact with the Program

- o How many employers has the program had direct contact with?
- o How many employers have hired older participants from the program?
- o What kinds of industries and businesses were represented by these employers?
- o What are the employers' evaluation of the older workers they hired: their training, the quality of their work, their attendance, level of skills, and relationship with co-workers?
- o In general, how satisfied are the employers who hired older workers trained in the program? Are they willing to hire other older workers?
- o Has the program's marketing campaign increased the general interest of local employers in older workers?
- o How may employers have taken the initiative to contact the program first?
- o What occupational fields were older workers hired in?
- o What marketing methods were most successful in reaching employers?
- o How did the program's advisory committee evaluate the marketing campaign to reach employers?

Impact of the Program on the Community

- o Did the increased employment of program participants result in an improvement in the economic base of the local area?
- o Is there an increased awareness of the employment needs of older workers in the community from publicity on the program?
- o Are older persons more aware of program services available for training and other employment problems?
- o Is there more emphasis in the educational community on serving older adults?

Summary

Program evaluation serves two major purposes: 1) it provides information that be can used to improve the program design in future program years to make the program more responsive to the clientele, and 2) it provides the data needed to substantiate that the purposes of the program were achieved and to show that the need for the program continues to exist.

Given the limited resources available, both Congress and the Department of Labor will be paying close attention to the evaluation of JTPA programs to determine future funding levels or if the programs should continue at all. Proper evaluation of the program and making the adjustments indicated by the evaluation process in both program design and operation may prove to be critical to the future of older-worker employment rograms.

Appendix A

ABSTRACTS OF THE NATIONAL COMMISSION FOR EMPLOYMENT POLICY

RESEARCH STUDIES

"Estimated Effects of 1983 Changes in Employer Health Plan Medicare Payment Provisions on Employer Costs and Employment of Older Workers", Joseph M. Anderson et al., ICF Inc.

Recent amendments to the Age Discriminaton in Employment Act resulting from the passage of TEFRA were analyzed in terms of costs to private employers and the effects on private employment. The Amendments were designed to shift the cost of health care for workers aged 65 through 69 from Medicare to employer health plans. The changes should have little effect on the aggregate employment of older workers (reducing demand by about 1 percent). They will raise employer costs by making employer plans the primary payer of benefits and by requiring any company with any type of benefit plan to cover employees aged 65-69 as well as younger workers. However, because these added employer costs will be offset by reductions in other compensation, such as wages and salaries, the author concluded that employment of older workers should change little because of this legislation.

"Age, Productivity, and Earnings: A Case Study of a High Tech Firm", Paul J.Andrisani and Thomas N. Daymont, Center for Labor and Human Resource Studies, Temple University.

The authors examined earnings differences between the older and younger professional and managerial workers of an anonymous high-tech firm and estimated how much of these differences are attributable to school, work experience, skills obsolescence, and similar characteristics rather than to changing attitudes toward work,

physiological aging, or age discrimination. The disadvantages of older workers (skills obsolescence, limited schooling, health problems, and less geographic mobility) are offset by greater work experience. However, reduced productivity associated with declines in performance, changing preferences for leisure, increased opportunity costs and shorter payback periods for on-the-job training, and age discrimination in employment account for roughly a 7.5 percent decline in the earnings of older workers. When firm-specific OJT investments are considered, virtually all association between age and earnings over the life cycle disappears.

"Sources of Labor Market Problems of Older Persons Who Are Also Women, Handicapped, and/or Members of Minority Groups", Robert L. Clark, North Carolina State University.

Certain demographic groups continue to have relatively low incomes and greater difficulties in finding and maintaining desirable positions in the labor market. This study presents earnings ratios by sex, race, educational attainment, and health status, to determine whether or not the relative earnings of these groups decline further with age. Using data from the Retirement History Study (RHS), Clark finds no evidence that nonmarried females, nonwhites, and persons with low levels of educational attainment experience declining earnings relative to white males as they grow older. However, the relative earnings of those with health limitations do decline with age. Additional years of education raise the life cycle earnings for each demographic group.

"Emerging State and Local Roles in Developing Options for Older Workers: Practice and Potential", James O. Gollub, SRI International.

The roles of the public and private sectors in stimulating desirable work opportunities for older workers are changing and policy strategies can increase the options. Five categories of policy tools are identified: regulation/deregulation, tax policy change, program

innovation, administrative reform, and public/private collaboration. Diverse (but limited) activities to increase employment options are taking place at Federal, State, and local levels, in progressive firms, and through new collaborative public/private organizations. Regulatory policies, administrative changes, and experimentation with new models of employment assistance have already established a framework on which further efforts can be built. The need is to promote more systematic policy change that is sensitive to the conditions facing business and to better link the older worker with labor market opportunities.

"Older Workers' Responses to Job Displacement and the Assistance Provided by the Employment Service", Terry R. Johnson et al., SRI International.

The study identifies the types of older workers who become displaced and examines the role of the U.S. Employment Service in assisting displaced older workers. Detailed interview data, combined with ES agency records on services provided, were the data set used for the analysis. The displaced older worker appears to be somewhat more advantaged than other older job seekers in terms of demographic characteristics and previous employment histories, but displaced older workers tend to have somewhat poorer subsequent reemployment experiences. They fare no better than other unemployed older workers. The characteristics of displaced older workers with successful reemployment experiences include more education (having at least a high school diploma), not being a mandatory ES registrant (not registering to receive unemployment insurance benefits), and living in a location with low unemployment rates. The authors make several recommendations, including special assistance to displaced older workers who are less educated or who are forced to leave long-held jobs. They suggest that improved job referral services for older workers should be a primary ES goal.

"Older Workers in the Market for Part-Time Employment", James M. Jondrow et al., Center for Naval Analysis.

After consulting a number of data sets and entertaining a number of hypotheses, Jondrow and his associates concluded that employers find part-time workers of any age to be more costly per hour and less productive than full-time workers of the same age. As a result, employers offer part-time workers a lower wage relative to full-time workers. For older workers, this prospect of low compensation for part-time work appears to be less appealing than full retirement, thus discouraging them from actively pursuing part-time jobs. Reducing social insurance taxes, removing the Social Security earnings limit, or offering subsidies all appear to be ineffective in drawing more older persons into part-time jobs. Since older persons themselves resist part-time work, the authors suggest that Federal policy initiatives in this area are unnecessary.

"Multiple Liability? A Survey and Synthesis of Research Literature Pertaining to Labor Market Problems of Selected Groups of Older Workers", Andrew I. Kohen, James Madison University.

Research literature on three possible sources of double jeopardy for older workers (being black, being female, or being handicapped) focuses primarily on earnings and joblessness as measures of labor market success or failure. Most of the studies surveyed do not show that the lower earnings or higher unemployment experienced by blacks as compared with whites grow worse at later stages of the life cycle. For older female workers, this form of double jeopardy is responsible for comparatively lower earnings and higher unemployment. For older handicapped workers, the few studies done also show double jeopardy. The survey and synthesis of existing research indicates the clear need for theoretical and empirical research directed explicitly at the questions of multiple jeopardy of older workers.

"A Human Resource Management Perspective on Work Alternatives for Older Americans", Carolyn E. Paul, Andrus Gerontology Center, University of Southern California.

Twenty-five companies that have become nationally known for their progressive policies targeted toward retirement-age workers were surveyed. Among formal personnel programs, labor pools for part-time work assignments and phased retirement were more often used (and publicized), while job-sharing, training/retraining, and job recruitment were less often used. Job redesign and job transfer tended to occur informally rather than formally. Public policies have stimulated the creation of job options, shaped their structure, and influenced their utilization by older workers. Management decisions to implement options were influenced by the culture of the organization, the need for the option in the workplace, the character of labor-management relations, and business conditions. Older worker utilization of employment options was influenced by management's communication of option availability, compensation and employee benefit provisions, and Federal employment policy regulations. The findings suggest the need for government marketing strategies to "sell" employment options to employers, unions, and older persons. Two federal policies provide disincentives for older workers: the Social Security retirement earnings test and the Employee Retirement Income Security Act (ERISA) pension suspension policy.

"Innovative Employment Practices for Older Americans", Lawrence S. Root and Laura H. Zarrugh, Institute of Gerontology, University of Michigan.

Using the National Older Worker Information System, a computerized data base developed at the University of Michigan, the authors analyzed a variety of company-sponsored innovative programs and practices involving older workers and discuss examples directed to specific segments of the workforce. Older workers encounter at least four major barriers to continued effective employment: negative stereotypes in hiring or job promotions, limited training or retraining opportunities, limited part-time employment options, and minor disabilities. In response to these problems, private sector employers have designed several innovative approaches: objective work appraisals, full- and part-time hiring programs targeted to mature workers, training and retraining programs designed for older persons, and job modification or redesign efforts that provide the opportunity for continued employment to workers who suffer a minor disability. Private sector programs of these types will continue to expand with the growth in the proportion of older persons in the national labor force, but these efforts will be limited to situations in which the program/practice works to the advantage of the employer as well as the older worker.

"Eligibility and Participation Rates of Older Workers in Employment and Training Programs", Kalman Rupp et al., Westat, Inc.

As part of a study of the participation of older workers in employment and training programs and the effectiveness of these programs, Rupp et al. examined the population eligible for CETA and Senior Community Service Employment Program (SCSEP). They found that the size of the CETA/SCSEP eligible population is limited by program-specific requirements. For CETA title II-B programs, some eligibility rules are advantageous to the elderly, but overall there is a clear negative association between age and the probability of title II-B participation. The estimated proportion of SCSEP eligibles rises

also with age. During the program year 1980-81, 23,000 persons aged 55 or over (0.5 percent of those eligible) participated in CETA II-B programs and 77,000 persons aged 55 and over (0.67 percent of those eligible) participated in SCSEP.

"Age Discrimination and Labor Market Problems of Displaced Older Male Workers", David Shapiro and Steven H. Sandell.

Shapiro and Sandell examined the age-wage relationship of displaced male workers 45 years and older who subsequently found new jobs between 1966 and 1978. Using the National Longitudinal Surveys (NLS) of Mature Men (aged 45-59 when first interviewed in 1966), the authors found that workers over age 65 did suffer wage penalties compared to younger reemployed displaced workers. The loss of firm-specific human capital associated with seniority on the predisplacement job accounts for most of the wage decrease, but some can be attributed to changes in the occupations and hours of work of displaced workers. Older workers who return to work are more likely to change occupations and to work part-time than younger workers. Overall, they conclude that age discrimination is not evident in the wages of displaced male workers aged 45 to 65.

"Women's Increased Lifetime Labor Supply: Implications for Social Security Policy", Steven H. Sandell, National Commission for Employment Policy.

Sandell focuses on the spouse benefit as an example of the importance of changes in women's lifetime labor supply on the Social Security system. In light of women's increased labor force participation and the current Social Security benefit computation rules, he concludes that those debating the merits of the spouse's benefits have exaggerated their cases. Those who claim elimination of the benefit would have a negative impact on child development ignore the fact that most women can spend their child-rearing years without working but still not receive substantial dependent's benefits. Those who call for elimination of the benefits fail to see that it may not be necessary to overhaul the system since, by the next century, only a small minority of women may actually receive the "subsidy" anyway. Sandell does, however, suggest that the current system could be made more equitable to all involved by basing spouse benefits on different criteria than the husband's (or higher earning spouse's) earnings. At any rate, policymakers designing legislation to change the benefit structure of Social Security should understand that the 21st century could be characterized by very different sex-related earnings and labor supply behavior than the recent past.

"Coordination and Cooperation Between SCSEP and CETA Operations", Cilla J. Reesman, Westat, Inc.

Interviews were held with a variety of CETA prime sponsors and SCSEP program operators to determine the extent of cooperation and coordination between CETA and SCSEP in meeting the needs of older adults. Where cooperation worked well, older adults could be employed and paid by SCSEP and trained by CETA. However, coordination and cooperation did not always exist. Some CETA sponsors felt that the training of young people was the prime mandate of CETA. Others felt

that the pressure to place trainees in jobs meant that it would not be feasible to train older adults who would be more difficult to place. The sample size was limited to 9 CETA prime sponsors and 9 SCSEP operators.

"Retirement and Older Americans' Particiipation in Volunteer Activities", Carol Jusenius, National Commission for Employment Policy.

Retired workers could be an important source of volunteers to meet needs left by declines in the role of government. If workers are persuaded to work more years, will volunteerism suffer? In a study of data on volunteerism, it appears that relatively few people participate in volunteer activities, and that volunteerism is lower, rather than higher, among older people. Education has a positive influence on the likelihood that an older person will volunteer, but living in an area with a high concentration of people in need has a negative influence. A history of volunteering is a high predictor of likelihood to volunteer in the future, but few people volunteer continually. Policies that encourage people to work more years rather than retire early are unlikely to affect the probability that an older man will volunteer. Policies that permit moving from full- to part-time work will increase the likelihood that older women will volunteer for some kinds of work. Income from assets (including Social Security) increases the likelihood of volunteering.

"Restructuring Social Security: How Will Retirement Ages Respond?", Gary S. Fields and Olivia S. Mitchell, Cornell University.

To estimate the magnitude of older workers' responses to a restructuring of the national Social Security system, the authors analyzed the current earnings, Social Security, and private pension opportunities available to older workers. Five restructuring proposals are examined to determine how they would affect retirees' incomes, and the corresponding responses of older workers are evaluated.

They found that lowering Social Security benefits for early retirement and increasing the gain from deferred retirement would have the biggest impact on delaying retirement; increasing the age of eligibility for normal benefits would have an immediate effect; increasing only the late retirement credit would have the least effect (essentially no change in retirement ages).

Among the policy implications are that reducing early retirement benefits and increasing the normal retirement age would save the Social Security system money but hurt the average worker, and those who could not postpone early retirement would suffer the most.

To obtain a copy of any of the above research studies, contact Steven H. Sandell, National Commission for Employment Policy, 1522 K Street, N.W., Suite 300, Washington, D.C. 20005, Phone (202) 724-1545

Author's Note: Most abstracts were reprinted from Older Worker Employment Comes of Age: Practice and Potential, James O. Gollub, SRI International, 1984, for the National Commission for Employment Policy.

Appendix B

NATIONAL COMMISSION FOR EMPLOYMENT POLICY

RESEARCH PAPERS
(Abstracted in Appendix A)

Anderson, Joseph M., Kennell, David L., and Sheils, John F., "Estimated Effects of 1983 Changes in Employer Health Plan/Medicare Payment Provisions on Employer Costs and Employment of Older Workers." ICF Incorporated, 1983.

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Appendix C

NATIONAL SCSEP SPONSORS

American Association of Retired Persons (AARP)
National Project Director, SCSEP
1909 K Street NW
Washington, D.C. 20049

Asociacion Nacional Pro Personas Mayores
Executive Director
1730 West Olympic Blvd, Suite 401
Los Angeles, CA 90015

Green Thumb Inc.
Administrator
1401 Wilson Blvd
Arlington, VA 22209

National Council of Senior Citizens (NCSC)
Deputy Director, Senior Aides Program
1511 K Street NW
Washington, D.C. 20005

National Council On the Aging (NCOA)
National Project Director, SCSEP
600 Maryland Ave., S.W.
West Wing 100
Washington, D.C. 20024

National Caucus and Center on Black Aged (NCBA)
National Director, SCSEP
1424 K Street NW Suite 500
Washington, D.C. 20005

National Urban League
National Director, SCSEP
The Equal Opportunity Bldg.
500 East 62nd Street
New York, NY 10021

USDA Forest Service
Human Resource Programs Director
P.O. Box 2417
Room 2117B, Auditors Building
Washington, D.C. 20013

Appendix D

RESOURCE ORGANIZATIONS

American Association of Retired Persons (AARP)
Institute of Lifetime Learning
1909 K Street, N.W.
Washington, D.C. 20049

Gerontological Society of America
1835 K Street, N.W., Suite 305
Washington, D.C. 20006

Gray Panthers
3635 Chestnut Street
Philadelphia, PA 19104

National Association of Area Agencies on Aging
600 Maryland Avenue, S.W.
Washington, D.C.

National Association of State Units on Aging
600 Maryland Avenue,S.W.
Washington, D.C. 20024

The National Center for Research in Vocational Education
Ohio State University
1960 Kenny Road
Columbus, Ohio 43210

National Senior Citizens Law Center
1302 18th Street, N.W.
Washington, D.C. 20049

Urban Elderly Coalition
600 Maryland Avenue, S.W.
Washington, D.C. 20024

Appendix E

OLDER WORKERS IN INDUSTRY

Types of Industries and Businesses Offering Work Alternatives to Older Workers

A Commission-sponsored study on innovative employment practices for older Americans conducted by the Institute of Gerontology at the University of Michigan examined the types of industries and businesses that have been willing to offer work alternatives to older workers. For analysis, the National Older Workers Information System (NOWIS), a computerized information system containing descriptions of private-sector programs and practices for older workers, was used. This system is supported by the Administration on Aging and can be a resource for employment and training groups, nonprofit organizations, employers, and unions that want to develop new methods of using the skills and experience of older workers (Root and Zarrugh, 1983).

The system contains narrative summaries of the work alternatives offered by private-sector employers and a data retrieval system identifying the practice by the type of industry or business, size of the company, geographic location, the nature of the program, and the type of workforce affected (skilled, unskilled, clerical, professional, and managerial).

The NOWIS data bank includes more than 150 companies representing some 300 programs or practices used in the private sector for older workers. About 75 percent of the companies reported that they had more than one employment option available for older workers. Approximately 10 percent of the companies reported four or more programs. Table 5 shows the range of industries offering various programs of different employment options to older workers.

TABLE 5

TYPE OF INDUSTRY	PERCENTAGE OF TOTAL LISTING PROGRAM OR PRACTICES FOR OLDER WORKERS
Manufacturing	41.8
Finance	17.0
Business Services	13.1
Wholesale and Retail Trade	9.2
Professional Services	9.2
Personal Services	2.6
Construction	.6
Communications	.6
Public utilities	2.0
Government	3.9
Total	100.0

(Source: National Older Worker Information System, data 1983.)

As can be seen, manufacturing was the type of industry most likely to have innovative practices for older workers. Manufacturing includes heavy industries, high-technology producers, and manufacturing subcontractors.

Finance, particularly banking and insurance, was the second most likely business, having 17 percent of the total program. Most programs in banking and insurance were aimed at clerical and other white-collar workers.

Business services, including personnel placement agencies and

consulting services, made up 13 percent of the total. These organizations tend to use professional and managerial workers offering highly specialized business support services.

Professional and personal services accounted for 12 percent of the companies. These include health, education, and welfare; personal services including domestic work, lodging, and garment services as well as entertainment and recreation.

Wholesale and retail trade companies which usually hire older workers for part-time sales work accounted for 9 percent of the total companies.

Most of the companies are large, having more than 500 employees; only 27 percent of the companies represented in the data have a workforce smaller than 500.

An analysis of the types of work alternatives offered revealed that more than half of the programs were for hiring older workers for part-time or temporary employment; 12 percent of the programs were for hiring older workers for full-time employment. Programs of job redesign, which included both physical changes and changes in job responsibility, accounted for 9 percent of the NOWIS program data. Training programs represented 13 percent of the NOWIS examples; training varied from inhouse courses to tuition reimbursement and granting leaves for individualized study. Flexible scheduling and worker job appraisals account for the remaining programs.

Transitional programs, such as phased retirement, were not included in NOWIS data because researchers believed that these program were not oriented to expanding employment opportunities for older workers (Root and Zarrugh, 1983).

Broad Categories of Generally Offered Work Alternatives

The study also evaluated the type of work done by older persons who were affected by these different programs in the private sector. For this purpose, four general groupings of workers were considered: (1) professional-managerial (2) other white-collar (3) skilled blue-collar and (4) semiskilled or unskilled blue-collar.

The review concluded with data showing that 31.6 percent of the employment options for older workers were for professional-managerial workers and 40.6 percent for clerical and other white-collar personnel. Thus more than 70 percent of these practices were geared to white-collar workers; only 7.5 percent represented programs for skilled blue-collar workers, and 20.3 percent for semiskilled or unskilled blue-collar workers (Root and Zarrugh, 1983).

The occupational distribution of older workers in the workforce today shows a somewhat similar pattern. Professional and managerial occupations account for 28.3 percent of the employed older workers, and 29.5 percent are in other white-collar jobs; blue-collar workers account for 42 percent of the total, with the majority of these older workers being in semiskilled, unskilled, and nonhousehold service jobs. (Root and Zarrugh, 1983)

From reviewing this data, it would appear that programs for blue-collar older workers were underrepresented in the NOWIS sample and white-collar workers are overrepresented. There could be two reasons for this situation: (1) programs for blue-collar workers have not gained the publicity and are not wellknown, or (2) programs that have been designed to increase employment opportunities for older workers have been aimed at service and clerical personnel and professional-managerial workers.

There are many examples in the NOWIS data of employers' hiring

older persons for semiskilled or unskilled jobs, such as parking lot attendants, cafeteria workers, cashiers, and light manufacturing (packaging, assembly); however, most employment options seem to be aimed at older persons with certain technical skills or skills in short supply.

For example, a small specialty car manufacturer hired older skilled craftsmen. A publisher hired retired writers or editors. A hospital employed older nurses on a part-time basis. Retired postal employees became couriers; retired policemen became bank guards. A defense contractor hired its own professional retirees because some of the projects required personnel with a "history" of prior work activities.

Conclusions for Program Operators

The authors of this study pointed out three considerations for understanding the current employment alternatives available for older workers in the private sector:

1. There are relatively few employment programs and practices that increase employment opportunities for older workers.
2. The varied approaches address only particular segments of the national workforce (generally skilled workers and professionals).
3. The existence of many of the employment options seems to be tenuous, with some suspending operation in the face of adverse economic conditions. Many of the programs were terminated during the recent recession.

(Root and Zarrugh, 1983)

JTPA program staff can use the NOWIS data to target the types of businesses and firms that might be more receptive to offering employment alternatives to older workers. The information can also be used to educate employers on the different employment alternatives available to them.

The following table illustrates the current distribution of older workers compared to all workers in various industries:

TABLE 4

Percentage Distribution of Employment by Industry of Older and All Workers, 1982

Goods-Producing Industries	Percentage of Workers Age 55+	Percentage of All Workers
Manufacturing	21.0	20.6
Construction	5.2	5.9
Agriculture	4.0	3.5
Mining	.9	1.0
Total	31.2	31.0
Service-Producing Industries		
Service	30.7	29.5
Trade	19.4	21.1
Finance, Insurance, Real Estate	6.8	6.4
Public Administration	6.0	5.3
Transportation, Public Utilities, and Communications	5.9	6.7
Total	68.8	69.0
Grand Total	100.0	100.0

(Source: Fullerton, 1983)

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